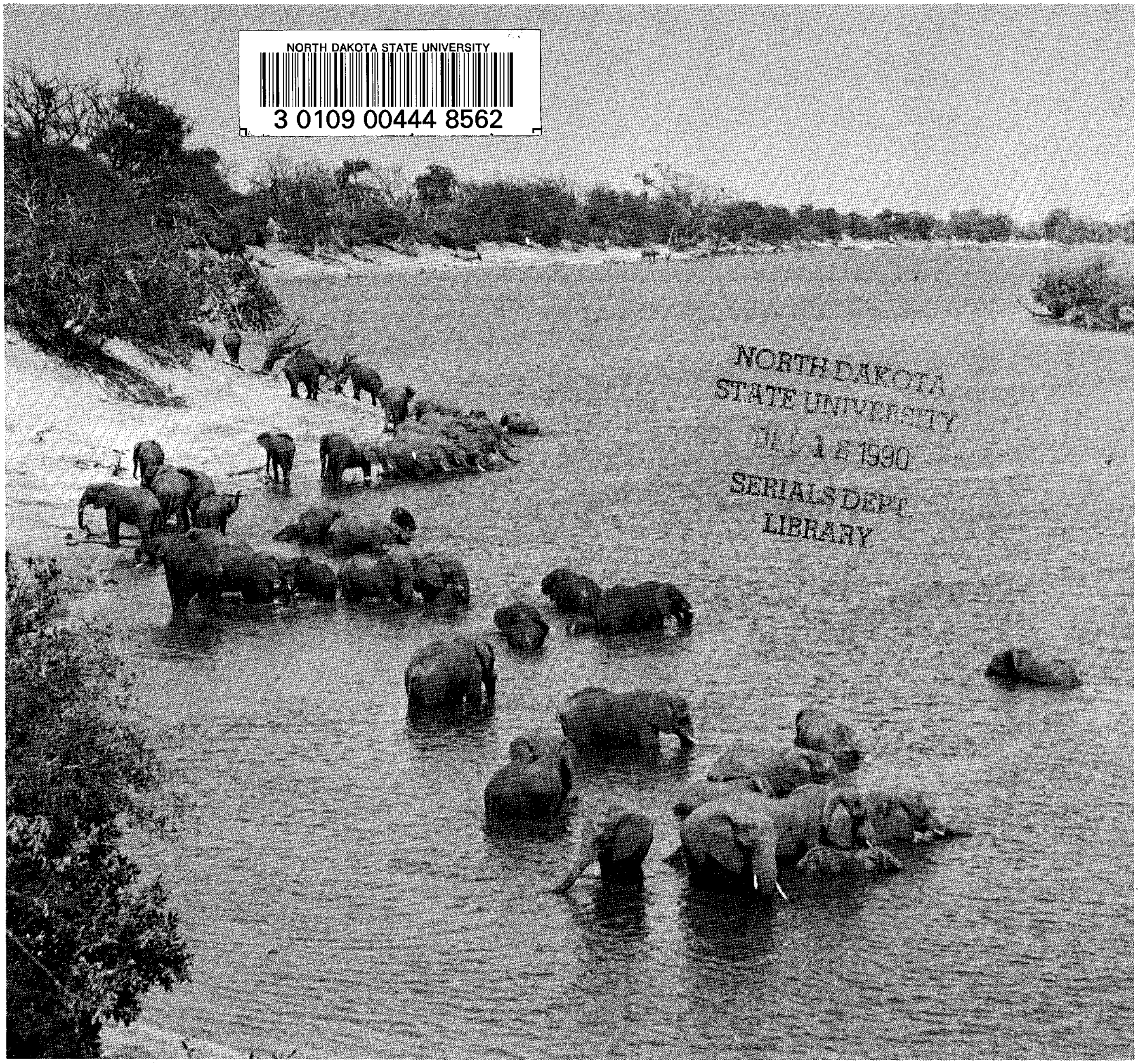


# Economic Impact of Wildlife-Based Tourism in Northern Botswana

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*Highlights*

*The direct economic impact of wildlife related tourism in Northern Botswana was focused on the safari industry, retail businesses dependent on tourism, and the government. Data were collected by means of personal interviews from tourists, safari companies, retail businesses, and the government sector. In additional, government records of tourism were obtained and analyzed.*

*An estimated 64,000 tourists to Northern Botswana spent 177,982,456 pula (USA $94,170,612) which included 141,078,859 pula (USA $74,644,489) paid directly to safari companies. Retail businesses dependent on tourism received 46,542,432 pula (USA $24,625,625) from tourists. Fees and taxes received by the government sector from tourists summed 8,571,744 (USA $4,535,314).*

*The majority of tourists came from the United Sates, Europe, and South Africa. The "likes" of tourists were the wildlife; the unspoiled nature of Botswana, specifically the Okavango Delta; and the friendly people. Their major "dislikes" included the heat, the roads and transportation system, and the infrastructure of Botswana. Nearly two-thirds of the respondents thought that access to wildlife was easy or very easy.*

*It was not possible to determine what portion of tourist expenditures are actually spent within Botswana or once spent, remain in Botswana. Only 22 percent of the travel agencies used by tourists was located in Botswana, and a large percentage of tourist expenditures was paid to the travel agency. No reliable information exists on the ultimate distribution of those funds.*

*Wildlife based tourism in Botswana has increased substantially during the past decade and is making an important contribution to the Botswana economy. The future challenge will be to capture as much as possible of the total tourist expenditure within Botswana, and to maintain the natural environment which is necessary to support continued growth in the industry. The 1989 Tourism Policy Paper, prepared by the Ministry of Commerce and Industry, will make substantial progress toward these challenges if its recommendations are implemented.*

# 1989 ECONOMIC IMPACT OF WILDLIFE-BASED TOURISM IN NORTHERN BOTSWANA

Lila Borge, William C. Nelson
Jay A. Leitch, and F. Larry Leistritz*

## Purpose

This study estimates the direct impact of tourism in northern Botswana on the private and public sectors of the economy. Specific topics addressed include income and expenditures for three sectors of the industry: tourists, safari companies, and retail businesses associated with tourism. In addition, general perceptions and suggestions to improve the industry were included in the survey of each group.

The study was conducted by North Dakota State University personnel, with the assistance of the Hotel and Tourism Association of Botswana (HATAB) and funded by the United States Agency for International Development (US AID).

HATAB is the voice of Botswana's tourism industry, with a current (private sector) membership of over 80 companies. The government has recognized HATAB's increasing role and regularly seeks advice from the executive committee on matters concerning tourism. The private sector has been responsible for investing in the industry with little support from the government (Sandenbergh 1990). Government policy has been, until recently, to spend as little as possible on the tourist industry because of its low expected returns. However, several studies have suggested that returns from tourism may, in fact, be more significant than previous government estimates (Snowy Mountains 1989, Fowkes 1985).

Botswana's tourist industry has been increasing rapidly and, along with uncontrolled development, has threatened the environment. The need for more information developed as a result of the government's recent interest in tourism. Growth in tourism within northern Botswana has been considerable, especially since 1978. For example, the growth of fixed safari camps, from 14 camps in 1978 to 32 in 1988, reflects this increase (Snowy Mountains 1989). However, the government has responded by releasing its first Tourism Policy draft paper in November, 1989.

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## Background

Botswana is well endowed with natural resources, including minerals, unique habitats, and wildlife. Botswana, like many developing countries, faces increasing pressure on its natural resource endowments, primarily renewable resources such as wildlife and the habitat it needs to survive. This pressure is, in part, a result of a rapidly developing economy, a growing agricultural sector, and a large beef export market.

The economy of Botswana is centered on diamond mining and the beef export market. This economic base is narrow and is exposed to market fluctuations around the world; therefore, it is desirable to diversify and pursue other options to boost the economy. One development option is tourism, which has substantial potential to contribute to the economy of Botswana.

Sustained and efficient use of natural resources is important and has been recognized by the government of Botswana. One conservation option in which the wildlife resource can justify its existence and "pay for itself" is through wildlife-related tourism.

## Tourism

Tourism is one of the fastest growing economic sectors in the world (Gee, Choy, and Makens 1984). The advent of mass communication and education has had a primary role in the increased numbers of travelers. Technological advancement in the industry has affected all segments of the economy and simultaneously raised economic, social, and environmental concerns. This has created considerable interest in tourism by developers, scientists, and environmentalists. The growth of tourism, with African countries such as Botswana becoming popular destinations, has led to the need for contemporary information about the impact of wildlife-related tourism on this region.

The tourist trade is economically important because it provides employment and income. To a host region such as northern Botswana, wildlife provides a basis for developing tourism as an export industry. Tourism is perceived as a means of increasing the level of economic activity of the host country through sales of goods and services to tourists. It can be extremely beneficial to some countries where wildlife-based tourism is a large source of revenue. Tourism generates employment, both directly and indirectly, as well as improvements in infrastructure. A strong link between wildlife/wilderness resources and tourism exists in Botswana, since the nation's diverse wildlife populations and unique habitats are the focus of its tourism promotion efforts (Ministry of Finance and Development Planning 1985).

Botswana's tourism industry began in the late 1960s. Hunting, photography, and game-viewing are the major activities for travelers in Botswana. Botswana's original safari companies are still operational and have been active since the early 1960s. A steady increase in the total number of arrivals from 352,994 in 1976 to 897,648 in 1988 indicates that Botswana has become a popular area to visit (Central Statistics Office 1989).

Wildlife and wilderness are the major attractions for tourists who travel to Botswana. Popular tourist areas such as Kenya still have large numbers of wild animals; however, the numbers of people traveling to Kenya have increased to the point of "mass tourism." Botswana has a large number and diversity of wildlife, but, in addition, it offers remoteness, low population density, and an unspoiled wilderness. Apart from those going to hunt, most visitors use the national parks and reserves to photograph birds and other wildlife.

## Area Description

Botswana's land area is 581,730 $km^2$ in area, slightly smaller than Texas and a little larger than France. Botswana has three national parks and five game reserves accounting for approximately 18 percent of the country's land area. The two districts used for the study area were Ngamiland and Chobe in the north.

Ngamiland extends 102,980 $km^2$ across the northwestern corner of Botswana and includes the Okavango Delta, formed by the Okavango River which flows from Angola and spreads out over northern Botswana. Another attraction in the southern part of the region is Lake Ngami, which is a good place to photograph birds when it holds water. In terms of variety, Ngamiland is one of the most rich and diverse areas of Botswana. Ngamiland has an extensive bird and mammal population because of the large expanses of water and its variety of ecosystems.

The intrusion of the wetlands (Okavango Delta) into the desert offers the tourist a beautiful contrast in both landscape and diversity of life. The major national park of interest in this district is Moremi Wildlife Reserve which is approximately 3,000 km$^2$. Moremi ranges in habitats from dry savanna woodland, mopani forest and floodplain to permanent swamp. Hill (1988) estimated that in 1987 approximately 9,500 total visitors entered Moremi Wildlife Reserve.

Chobe district, situated in the northeast of Botswana and including Chobe National Park, is another major attraction for tourists visiting Botswana. The Chobe National Park is a large area of nearly 11,000 km$^2$ with various habitats, from flood plain to forest. The Chobe park has one of the largest elephant populations in Africa, estimated at over 35,000. The diversity of game is rich with undeveloped wilderness as the main attraction within the park. Many tourists travel through Chobe park; Hill (1988) estimated that approximately 22,000 people entered the park in 1987. More extensive information concerning numbers of people and revenue generated by the Department of Wildlife and National Parks is in Appendix D.

## Previous Studies

Tourism in northern Botswana has been studied intensively during the eighties. Two reports were prepared by Fowkes; the first identified participants in the tourism industry (1982) and was followed by a study indicating the economic contribution of tourism to the economy of Botswana (Fowkes 1985). Roberts (1985), Ingram (1985), Fowkes (1985), and Warren (1985) completed a series of publications reporting tourists' perceptions, movements, and spending patterns and park entry permits for 18 months in 1984-1985. An additional study based on park permit data was done by Hill (1988), who also conducted a survey of tourists' perceptions in the parks and analyzed the national parks entrance records for 1984-1988.[1] Snowy Mountains Engineering Corporation (1989) produced a report concerning ecological zoning in Ngamiland, with a tourism section detailing the Okavango Delta's attractions, camps and facilities, along with recommendations for further tourism development. One additional study was undertaken by Price Waterhouse (1988) to estimate the economic impact of the safari industry. The study received little response from the safari industry, so the results were not compiled into a formal report (Scott 1990).

[1]Hill's study included three parks: Moremi Wildlife Reserve, Chobe National Park, and Nxai Pan National Park.

## Procedure

The economic impact of wildlife tourism on two districts of northern Botswana was the focus of this study. Primary data were obtained through three questionnaires -- one each for tourists, safari companies, and the businesses associated with tourism in northern Botswana (Appendix A). These survey instruments were developed to gather data on the impact of the tourism industry on both the private and public sectors of the economy. For example, the private sector (safari companies and businesses related to tourism) receives money for safaris, airfares, food/lodging, and any extra funds spent on curios. The public sector (government) receives taxes paid by the private sector, hunting fees, and park entrance fees. The questionnaires were designed to elicit both general perceptions and the financial contribution made by the tourism industry to both public and private sectors. They were designed for a personal interview format. The three targeted groups were interviewed in both Ngamiland and Chobe districts, focused on the cities of Maun and Kasane, the centers of tourism in each district.

Along with data from the questionnaires, all available 1989 park permits for Moremi Wildlife Reserve and Chobe National Park were obtained. These data give a general estimate of numbers of people, revenue collected, days in the park, camping fees, and resident/citizen/non-resident ratios. Park permits were obtained from the Department of Wildlife and National Parks. In addition, the Botswana Outfitters and Professional Hunters Association supplied the hunting industry's facts and figures for 1986 through 1988 along with estimates for 1989.

## Study Populations

### Tourists

The government of Botswana publishes an annual tourist statistical analysis, by the Central Statistics Office in Gaborone, that separates arrivals by categories. In the section "Arrivals by Purpose of Entry and Month" (1988), several categories of visitors are listed: returning resident, business, holiday, employment, transit, day visitor, and other. The scope of this study was to focus on the "holiday tourist." A tourist is a temporary visitor staying at least 24 hours in a country for the purpose of either leisure or business. Total arrivals into Botswana for 1988 were 897,648, of which 61,000 were classified as "holiday" visitors and assumed to be non-residents (Central Statistics Office 1989).

Tourists who come to Botswana are generally of three types distinguished by the price they choose to pay for their holiday. The first is the person who chooses to stay at a permanent camp. The client is flown into either Maun or Kasane and is transported directly to the camp. This type of tourist has been termed the "high cost" client by several groups (including the government) meaning a high price is usually paid for the package in advance, and are generally confined to camps owned by the company from which they bought their package.

The second type of tourist is the mobile safari tourist. This type of safari is generally less costly than a permanent camp; however, in several cases it is comparable. The tourist is flown into Maun or Kasane and departs from there on a specialized trip into the "bush" of Botswana. Since the fees for a mobile safari tour are comparable to camps, this class of tourist was grouped together with the "permanent camp" tourist to estimate the impact of the "high cost" tourist.

The third type of tourist is the independent traveler. Roberts, Ingram, and Fowkes define the independent tourist as one who "travels independently, relying upon his own resources, and not as part of an organized tour group." These travelers may drive independently, hire a guide, or charter a flight. The distinguishing feature is that they usually do not pay a "package price" before entering Botswana, and they generally use public facilities (park campsites) run by the Department of Wildlife and National Parks (DWNP), though some use privately owned campsites. This type of tourist has been termed the "low cost" tourist, because of the assumed low expenditures. In some cases, tourists combine types of travel, such as taking a mobile safari as well as driving into the parks independently.

To obtain a sample of the "high cost" tourist, permission was granted by several permanent camp operators/owners to interview tourists at their camps. In addition, mobile safari tourists were interviewed both at public and private campsites and in towns directly after their trip. Finally, public campsites were visited to interview the independent travelers; however, since the increase in park fees on July 1, 1989, not many independent tourists were at public campsites.[2] In many cases, the campsites were occupied by mobile tour operators and their clients. Customers at the Maun Airport were interviewed; however, given the situation with heat, time constraints, and customs/immigration, this was not an ideal location. In total, 150 tourists were interviewed.

## Safari Companies

Approximately 40 safari companies operate in northern Botswana (Sheller 1990). Total safari companies working in Botswana are numerous; for example, approximately 67 companies in 1985 (Fowkes 1985). However, of those, approximately 40 (this number is constantly changing as companies consolidate with others) are based and operate in northern Botswana. Therefore, in this study, the population of safari companies is assumed to be 40. Forty companies were contacted, and 20 usable responses were received. Ideally, interviews should have been conducted through personal contact. In some cases, circumstances made it impossible to do so; therefore, some of the completed questionnaires were mailed back. Generally, safari companies were reluctant to fill the questionnaire out completely, possibly because of detailed financial data requested.

## Associated Industries

Businesses associated with tourism were interviewed. Examples of an associated industry are hotels and lodges, food and beverage establishments, souvenir/curio shops, transportation services and "other" services. The focus of interviewing was in Maun (Ngamiland district) and Kasane (Chobe district), towns known as the central location for tourism in each district. A list of businesses contacted in the Fowkes (1985) study was used as a reference for contacting businesses. The chairman of the Hotel and Tourism Association of Botswana (HATAB) in Maun and another HATAB member in Kasane helped to identify other businesses in each area that would be relevant to the study. A total of 24 usable responses was obtained from the 34 businesses contacted in Maun. Kasane has fewer tourist-related businesses,

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[2]The low numbers of independent travelers found at the public campsites may have been attributed to the increase in park fees (July 1, 1989) or the time of year the research was conducted.

and 10 of 14 businesses contacted responded. Therefore, 34 businesses associated with tourism in Ngamiland and Chobe districts were interviewed. Many of the businesses contacted were reluctant to complete the questionnaire in full, particularly the financial questions.

## Limitations

A general limitation affecting the outcome of the tourist questionnaire data is the time of year that the interviews took place. The tourism season in northern Botswana is generally from March through October, the best months for game-viewing and personal comfort. The research permit granted by the President's office in Gaborone was for this research to take place between September and March, the less busy months for tourism. Most permanent camps were full or nearly full at the time of the research, so sufficient interviews were conducted. The public campsites were visited at a time of year that they are normally used during the holidays; however, the campsites were not being used to their capacity.

Another limit to the study was the response rate and cooperation given concerning financial information from the private sector. The government of Botswana has made many allegations about the private sector, mainly concerning the foreign exchange that comes into the country (Mothoagae 1990). HATAB thought that this project would help to "shed some light" on the financial situation of the tourism industry. The private sector, represented by HATAB, encouraged this project and supported the research in Botswana. However, many members failed to answer questions, particularly those concerning finances.

The park permit data gathered from the Department of Wildlife and National Parks presented problems and limitations of their own. All existing permits were obtained for Moremi Wildlife Reserve (in Ngamiland district) and Chobe National Park (in Chobe district). Another park in Ngamiland is Nxai Pan; permits for this park were not available. In some cases, the permits were illegible or were not consistent in the way they were completed. Several permits did not have complete information, and the amount of fees charged for many of those permits were unclear. The data were obtained in January 1990; therefore, the months of December (for both parks) and November (for Chobe National Park) were not available.

The July 1, 1989, fee increase added to the inconsistencies in park permit data. Before July 1, weekly and annual permits were sold and recorded in a manner so that actual days in the park were difficult to determine. For example, a permit may indicate that the visitor purchased a weekly permit; therefore, the gate attendant would record "seven days," while the visitor may only be in the park three days. For those type of permits, the visitor was assumed to have stayed seven days. After July 1, these annual/weekly permits were not available, though the first month of the fee change appeared to be confusing for some gate attendants. This was reflected in the inconsistent completion of some permits issued for July.

Another limitation with the park fees was that in many cases, permits were paid by safari companies in "lump sum" payments. Data on these permits were unclear concerning numbers of people, days, nights, and almost all other information. For example, some of these permits recorded numbers of people, while others did not; therefore, a large gap in numbers of people entering the parks exists. Several of the lodges/camps that do pay in this ("lump sum") fashion probably had not paid by the time the permits were collected, since no pattern existed in the time or procedure that these camps paid fees to the parks.

## Results

Economic impact studies are conducted for political entities such as cities, regions, states, or nations and usually relate to an annual period. Impact analyses indicate the contribution of tourism to the economy in terms of income, employment, government revenue, and the resource base. The results of this study are organized in four parts corresponding with the three questionnaires used for tourists, safari companies, associated businesses, and an overall impact. Park permit data (Appendix D) are analyzed for the use of parks by the tourism industry.

### Tourists

The Central Statistics Office (CSO) of Botswana estimates 61,000 "holiday" tourists came into Botswana in 1988 (Central Statistics Office 1989). Even though this number represents holiday tourist's coming into the country, northern Botswana is the major attraction for tourism. Therefore, this figure will be used as a "base" figure to estimate the tourist population for this study.

A total of 150 tourists was interviewed; of those, 78 were permanent camp tourists, 37 were on a mobile safari, and 35 were traveling independently. Permanent camp and mobile tourists were grouped as "high cost" for this study because of their similar expenditures.

Most of the visitors interviewed (95 percent) were non-residents. Using the base figure of 61,000 visitors and the fact that 5 percent of the study sample was residents or citizens, a total of 64,211 or 64,000 (61,000/.95) tourists was used as the tourist population coming to northern Botswana on holiday.

## Tourist Profile

The majority of travelers were from continental Europe (28 percent)(excluding United Kingdom), the United States (21 percent), and the Republic of South Africa (20 percent) (Table 1).

Estimates of tourist numbers distinguishing between permanent camp/mobile safari (high cost) visitors and independent (low cost) tourists are lacking. Snowy Mountain (1989) estimated that tourists occupying permanent camp (PC) sites totalled 47,000 bednights for 1988. These estimates were for the Okavango Delta region (Ngamiland) only; however, it was assumed that the proportions for the whole of northern Botswana were the same. Independent (I) tourists were estimated at 32,000 bednights (1988) with a ratio of 1.47 PC to 1.0 I tourists (Snowy Mountain 1989). Applying the ratio for PC/I to the estimated 64,000 tourists yields the following estimates for each group: PC + Mobiles equal 38,089 tourists, and independent tourists total 25,911 (Table 2).

The oldest person interviewed was 75 years old, the youngest was 18, and the average age of all of the interviewees was 43. The majority of respondents were married (59 percent) males (67 percent). The average number of people traveling in a group was five.

Occupations of the tourists varied; however, 26 percent were professionals (doctor, teacher, lawyer), 23 percent executive/manager or public official, and 21 percent retired or

TABLE 1. BOTSWANA TOURIST COUNTRY OF RESIDENCE (1989)*

| Country of Residence | Responses Number | Percent |
|---|---|---|
| United States of America | 31 | 21 |
| Other Europe | 31 | 21 |
| Republic of South Africa | 30 | 20 |
| United Kingdom | 23 | 14 |
| Germany | 10 | 7 |
| Australia/New Zealand | 9 | 6 |
| Botswana | 7 | 5 |
| Other Africa | 7 | 5 |
| Other World | 2 | 1 |
| Total | 150 | 100 |

* Question 1 on the tourist questionnaire (Appendix A).

TABLE 2. POPULATION ESTIMATES FOR BOTSWANA TOURIST GROUPS (1989)

| | Percentage | Total Tourists |
|---|---|---|
| PC + Mobiles | 59 | 38,089 |
| Independent | 41 | 25,911 |
| Total | 100 | 64,000 |

self-employed (Table 3). The average annual income was $47,377 for 79 percent of the respondents who answered the question. Most (96 responses) of the tourists said that they were on a non-guided tour; 61 had a guide. These figures do not represent "high- and "low-cost" tourists, because many of the respondents at the permanent camps reported that they did not use a guide, while an independent traveler who hired a guide for a short trip replied that he was guided. The reason for more than 150

TABLE 3. BOTSWANA TOURIST OCCUPATIONS (1989)*

| Occupation | Responses Number | Percent |
|---|---|---|
| Professional | 39 | 26 |
| Executive/manager/public official | 34 | 23 |
| Other (retired/self-employed) | 32 | 21 |
| Student | 16 | 11 |
| Housewife | 12 | 8 |
| Clerk, secretary, nurse | 9 | 6 |
| Crafts person | 4 | 3 |
| Sales | 1 | 2 |
| Farmer, rancher | 1 | 0.5 |
| Armed Forces | 1 | 0.5 |
| Totals | 150 | 100 |

* Question 12 on the tourist questionnaire (Appendix A).

responses was that some people were guided during part of their trip.

The average number of days spent in the Ngamiland and Chobe districts was nine out of 12 days in Botswana or 80 percent of their total holiday. This substantiates that this area is the major tourist attraction in Botswana. The average time spent in the Delta area was three days and in the Chobe Park area six days. Several respondents (17) spent an average of three days in the central Kalahari area, which is outside the Ngamiland and Chobe districts. Hill (1988) reported the average length of stay total in Botswana was 15.5 days

## Tourist Expenditures

Financial information concerning income and expenses was collected in the currency of the tourists' country of residence and converted into U.S. dollars (Appendix B). Therefore, for consistency in this report, all of the economic data for tourists are expressed in U.S. dollars.

The average cost of a safari package for 114 responses was $1,643 (Table 4). The high-cost tourist (PC + Mobiles) was the major contributor to this estimate, which was expected because independent tourists generally do not pay a "package price" before entering Botswana.[3] The high-cost tourist spent an average of $1,689 per trip or $188 per day (average nine days in northern Botswana) (Table 5). The independent traveler paid an average of $398 per trip or $44 per day.

Sixty-eight percent (78 of the 114 respondents) prepaid an average of 94 percent of the total for their holiday package before reaching Botswana (.94 x .68 = 64 percent). Therefore, a total of $74,644,899 was generated by tourists paying a package price, with 64 percent ($47,772,735) of it prepaid outside Botswana, so $26,872,164 (P50,788,389) was spent directly in Botswana. A large percentage of safari packages paid in a tourist's country of residence suggests that an unknown percentage of that money may not reach Botswana, at least not directly.

Table 6 shows what the safari package included. Lodging (75 percent) and food (69 percent) were included most often in the

TABLE 4. BOTSWANA TOURIST SAFARI "PACKAGE PRICE" COSTS (1989)*

| | Total $ Cost/Trip | Number of Responses | Average Cost/Trip | Average Cost/Day (9) |
|---|---|---|---|---|
| Perm/Camp | 119,748 | 73 | 1,640 | 182 |
| Mobiles | 65,993 | 37 | 1,784 | 198 |
| Independent | 1,592 | 4 | 398 | 44 |
| Total | $187,333 | 114 | $1,643 | $183 |
| Total (pula)** | P354,059 | | P3,105 | P345 |

* Refer to question 9a on the tourist questionnaire (Appendix A)
**Pula (P) is Botswana's currency.

[3]"Independent tourist" meant that they are in Botswana independent of a safari tour; however, four of the independents interviewed paid for a safari upon entering the country, but for the majority of the time in Botswana were dependent on their own resources.

TABLE 5. SAFARI PACKAGE EXPENDITURE TOTALS FOR BOTSWANA TOURIST POPULATION (1989)

| | Number of Responses | Population Estimate | Average Expenditures | Average Expend./Fees | Total |
|---|---|---|---|---|---|
| P.C. + Mobiles | 110 | 38,089 | 1,689 | 188 | 64,332,321 |
| Independents | 4 | 25,911 | 398 | 44 | 10,312,578 |
| | | | | | $74,644,899 |
| | | | | | P141,078,859 |
| 78 respondents paid 94 percent of their total package in their country of residence = 64 percent | | | | | $47,772,735 |
| Total $ paid in Botswana | | | | | $26,872,164 |
| Pula Exchange Rate (1.89) | | | | | P50,788,389 |

total price. "Travel," meaning travel while in Botswana, was included for 66 percent of the respondents, and airfare was included in 40 percent of the package prices.

TABLE 6. ITEMS INCLUDED IN BOTSWANA TOURISTS' SAFARI "PACKAGE PRICE" (1989)*

| | Responses | |
|---|---|---|
| | Number** | Percent |
| Airfare | 60 | 40 |
| Food | 104 | 69 |
| Lodging | 112 | 75 |
| Fees | 84 | 56 |
| Travel | 99 | 66 |
| # Responses | 459 | |
| # Respondents | 150 | |

* Refer to question 10 on the tourist questionnaire (Appendix A).
**Multiple responses were allowed.

The tourists estimated their expenses, excluding the safari package price. These expenses totalled $41,015 (P77,518) and included all independent travelers' expenses, as well as "extras" for tourists staying at permanent camps. Airfare and food and beverages were the items on which travelers spent; on average, airfare was the most expensive item (Table 7).

On average, the "high cost" tourists (PC + Mobiles) spent $231 on fees outside the safari package price (Table 8). With a population estimate of 38,089 for high cost tourists, this group spent an estimated $8,798,559 (P16,629,276) (Table 9). Independent travelers spent an average of $414 when visiting northern Botswana. The population estimate of 25,911 independents indicates a total direct impact of $10,727,154 (P20,274,321) to the economy. The total spent by "high-" and "low-cost" tourists outside of the package price equals $19,525,713 (P36,903,597), all of which was paid within Botswana. An unknown percentage is taken out of the country. Therefore, the total package price paid in Botswana by both high and low

TABLE 7. BOTSWANA TOURISTS' EXPENDITURES EXCLUDING "PACKAGE PRICE" (1989)*

| Item | # Respondents With expense | Percent Respondents With Expense | Sum Estimate | Average per 150 Tourists |
|---|---|---|---|---|
| Airfare | 37 | 25 | 9405 | 63 |
| Food/bev. | 112 | 75 | 9811 | 65 |
| Other exp. | 68 | 45 | 6080 | 41 |
| Park fees | 48 | 32 | 4260 | 28 |
| Transport | 31 | 21 | 3789 | 25 |
| Lodging | 40 | 27 | 3020 | 20 |
| Curios | 70 | 47 | 2919 | 19 |
| Clothes | 30 | 20 | 956 | 6 |
| Film/cam | 13 | 9 | 769 | 5 |
| Camp/eq | 1 | .6 | 6 | .4 |
| TOTAL | | | $41,015 | $272 |
| Total (pula) | | | P77,518 | P515 |

* Question 11 on the tourist questionnaire (Appendix A).

TABLE 8. EXPENDITURES PAID IN BOTSWANA EXCLUDING SAFARI "PACKAGE PRICE" BY EACH TOURIST GROUP (1989)

| | No. Respondents | Average Expenditure | $Avg/Day | Total Spent by each Group |
|---|---|---|---|---|
| PC + Mobiles | 115 | 231 | 26 | $26,511 |
| Independent | 35 | 414 | 46 | $14,504 |
| Total | 150 | $273 | | $41,015 |
| Total (pula) | | P516 | | P77,518 |

TABLE 9. TOTAL EXPENDITURES PAID EXCLUDING THE SAFARI "PACKAGE PRICE" BY EACH TOURIST GROUP (1989)

| | Population Estimate | Average Expenditure | Sum of Expenditures |
|---|---|---|---|
| Perm/Camps | 38,089 | 231 | 8,798,559 |
| Independents | 25,911 | 414 | 10,727,154 |
| 100 percent paid in Botswana | | | $ 19,525,713 |
| Exchange Rate (1.89) | | | P 36,903,597 |

cost tourists was $74,644,899 (P141,078,859), and "other" fees outside of the package fee for both groups was $19,525,713 (P36,903,597) (Table 9). The total revenue generated from tourists was estimated at $94,170,612 (P177,982,456) (Table 10). This estimate did not take into account the unknown percentage of revenue that does not reach Botswana (e.g., 64 percent paid package price in their country of residence).

The percentage of fees paid outside Botswana by tourists that actually reaches the country was unknown. The percentage of revenue paid to safari companies (in-country) that remains in

TABLE 10. TOTAL EXPENDITURES PAID BY BOTSWANA TOURISTS (1989)

| | |
|---|---|
| Package price fees | P141,078,859 |
| Fees other than package | P36,903,597 |
| Total expenditures (pula) | P177,982,456 |
| U.S. dollar | $ 94,170,612 |

Botswana is unknown. The estimated tourist expenditures, P177,982,456, was perhaps a overestimate of the direct economic impact within Botswana.

The non-resident hunting industry generates large amounts of foreign exchange. Snowy Mountain Group (1989) estimated that the annual hunter-days contribution would be approximately 58 percent of the total of all other tourists coming to northern Botswana. If this estimate were applied to the total "high-cost" tourist expenditures, the total expenditure for photographic and hunter tourists would more than double the economic impact. However, because the lack of data concerning hunters "true" expenditures and the unknown population size of this group, these expenditure estimates were excluded from the report.

## Tourists' General Perceptions of Botswana

This section was meant to reveal some of the general perceptions that the tourist had when traveling in Botswana. These included reasons for coming to Botswana, likes and dislikes, and comparisons with other African countries.

The question "Why did you choose Botswana as your vacation destination?" had 186 responses as people were allowed to give multiple answers (Table 11). Of the respondents, 44 percent chose "other" as the reason for visiting Botswana. "Other" usually meant they were visiting family, they were already in South Africa, or they just wanted to see new and different places. The Okavango Delta was the specific attraction for 25 percent of the respondents. Visiting friends was the response for 21 percent of the tourists.

TABLE 11. TOURIST REASONS FOR CHOOSING BOTSWANA AS A VACATION SITE (1989)*

| | Responses | |
|---|---|---|
| | Number** | Percent |
| Other ** | 81 | 44 |
| Okavango Delta | 47 | 25 |
| Friends | 39 | 21 |
| Fewer tourists | 12 | 6 |
| Business | 7 | 4 |
| | 186 | 100 |

* Question 14 on the tourist questionnaire (Appendix A).
**"Other" included visiting family, traveling in South Africa, or it was just a last minute plan to travel to Botswana.

An open-ended question concerning three likes and dislikes brought varied responses. The results were categorized and put in order of first, second, and third choice. The category with the most total responses was "to experience unspoiled Africa." However, the first choice for most of the respondents was wildlife on their holiday in northern Botswana (Table 12). While wildlife was not the only attraction for tourists, it is the "wilderness experience" that Botswana offers. Hill (1988) found that most responses concerning "likes" referred to features of the parks visited, the wildlife, and the unspoiled environment.

The dislikes mainly focused on the roads/transport, infrastructure such as services (e.g., communications and banks), and litter scattered about the towns and campsites (Table 12). "Heat" was a primary dislike for several travelers; however, perhaps that only reflects the time of year they visited Botswana. Hill (1988) found that most respondents disliked Botswana defense roadblocks, customs officials, and litter along the roadside.

TABLE 12. BOTSWANA TOURIST LIKES AND DISLIKES IN ORDER OF IMPORTANCE (1989)*

| | Three LIKES in Order of Importance | | | |
|---|---|---|---|---|
| | 1st Choice | 2nd Choice | 3rd Choice | Total #Responses |
| Unspoiled Africa | 39 | 29 | 22 | 107 |
| Wildlife | 53 | 29 | 20 | 103 |
| Okavango Delta | 20 | 24 | 34 | 78 |
| Friendly people | 22 | 10 | 20 | 52 |
| Accommodation | 3 | 13 | 8 | 25 |
| Freedom | 1 | 7 | 8 | 16 |
| Fewer tourists | 7 | 6 | 3 | 16 |
| Hospitality | 3 | 6 | 6 | 15 |
| Accessibility | 0 | 2 | 1 | 3 |
| | Three DISLIKES in Order of Importance | | | |
| Roads/Transport | 11 | 5 | 4 | 20 |
| Infrastructure | 9 | 6 | 4 | 19 |
| Litter/garbage | 4 | 9 | 2 | 15 |
| Heat | 12 | 1 | 0 | 13 |
| Unfriendly people | 4 | 5 | 4 | 13 |
| Too expensive | 7 | 3 | 2 | 12 |
| Poor park fac. | 5 | 6 | 0 | 11 |

* Questions 15 and 16 on the tourist questionnaire (Appendix A).

Botswana is known for its diversity of wildlife, with many animals for tourists to watch. The question, "Were you able to find the game or photography you were expecting here?" was meant to obtain the tourists' perceptions of this situation (Table 13). "Easy" and "very easy" were the most frequent answers to this question, with a total of 75 percent of all respondents.

Only 1 percent of the tourists who answered this question felt that game was difficult to find, and in these cases it was usually on a particular day they did not see much game. Overall, the responses indicate that game is still available for tourists to photograph in Botswana.

TABLE 13. BOTSWANA TOURIST PERCEPTIONS OF WILDLIFE AVAILABILITY (1989)*

| Responses | Responses Number | Percent |
|---|---|---|
| Very difficult | 2 | 1 |
| Difficult | 4 | 3 |
| Okay | 31 | 21 |
| Easy | 56 | 37 |
| Very easy | 57 | 38 |
| Total | 150 | 100 |

* Question 17 on the tourist questionnaire (Appendix A).

Botswana tourism has increased in the last several years. Other countries, such as Kenya, have been popular tourist attractions for many years, and people now are discovering Botswana as an alternative holiday destination. When asked to compare their other African experiences with the holiday in Botswana, 76 percent of the responses rated Botswana positively and 8 percent negatively. An additional category, 12 percent of the tourists mentioned, was that they could not compare these experiences, and 4 percent thought "their other African excursions" were generally the same.

Seventy-two percent replied this was their first trip to Botswana. When asked if they would return, 97 percent said they would like to. The remaining 3 percent said they would not like to return, usually had been to Botswana before, and wanted to see other places in the world. Hill (1988) found that the majority of respondents (97 percent) said that they would like to return to Botswana.

To get a general picture of the tourists' perceptions of the tourist infrastructure/services in Botswana, they rated a list of services 1 through 5, where 1 = highest and 5 = lowest (Table 14).

TABLE 14. TOURIST RATING OF INFRASTRUCTURE AND SERVICES IN BOTSWANA (1989)*

| | Responses | | |
|---|---|---|---|
| | Number** | Percent | Average |
| Airline access | 92 | 61 | 1.8 |
| Airline services | 88 | 59 | 2.0 |
| Customs/immigration | 140 | 93 | 2.4 |
| Quality of transport | 29 | 19 | 2.9 |
| Ease of making -- | | | |
| Travel arrangements | 41 | 27 | 2.4 |
| Quality of local serv. | 99 | 66 | 2.6 |
| Abundance of local serv. | 69 | 46 | 3.0 |
| Overall experience-- | | | |
| In Botswana | 145 | 97 | 1.4 |

* Question 22 on the tourist questionnaire (Appendix A).
**Multiple responses were allowed.

The lowest average rating was the abundance of local services at 3, and quality of transport was 2.9. The overall rating of their experience was quite high at 1.4, reflecting that tourists were generally satisfied with their trip.

Questions Suggested by the Hotel and Tourism Association of Botswana (HATAB)

This section concerns several additional questions that were added to the questionnaire at the request of HATAB. The extra questions 24 - 34 (Appendix A) were meant to reflect some of the issues HATAB was interested in at the time.

Nationality (or country of citizenship) was of interest because nationality of a tourist may differ from their country of residence. However, the nationality and country of permanent residence were quite similar (Table 15).

The mode of transport to Botswana inquiry obtained a general picture of the traffic and use of existing transport

TABLE 15. BOTSWANA TOURIST NATIONALITY COMPARED TO COUNTRY OF RESIDENCE (1989)

| Country | Nationality Number | Nationality Percent | Country of Residence Number | Country of Residence Percent |
|---|---|---|---|---|
| United Kingdom | 35 | 23 | 21 | 14 |
| Other Europe | 33 | 22 | 32 | 21 |
| United States | 30 | 21 | 32 | 21 |
| Rep. of S. Africa | 24 | 16 | 30 | 20 |
| Germany | 11 | 7 | 10 | 7 |
| Australia/N.Zealand | 9 | 6 | 9 | 6 |
| Botswana | 3 | 2 | 7 | 5 |
| Other World | 3 | 2 | 2 | 1 |
| Other Africa | 2 | 1 | 7 | 5 |
| Total | 150 | 100 | 150 | 100 |

* Questions 1 and 24 on the tourist questionnaire (Appendix A).

systems. The independent tourists and some of mobile safari groups came to Botswana in cars (Table 16). Tourists staying at permanent camps generally arrived via a major airline or by private charter. Of those using a major airline,[4] 52 percent came from the Republic of South Africa (RSA), 28 percent from other African countries (mainly Zimbabwe or Kenya), and 17 percent directly from Europe. The private charter clients generally came from the RSA, whereas overland mobile trips originating outside Botswana usually came from Zimbabwe.

One of the government's hypotheses was that the majority of the money paid for Botswana safaris does not reach Botswana.[5]

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[4]"A major airline" includes Air/Republic of South Africa (34), Air/other Africa (18), Air/Europe (11), and Air/Botswana (2).

[5]This percentage of "tourism revenue" that does or does not reach Botswana is unknown at the moment; however, a thorough study of the subject is needed.

TABLE 16. TOURISTS' MODE OF TRANSPORT TO BOTSWANA (1989)*

| | Responses | | Origin of Respondents who Used Major Airline |
|---|---|---|---|
| | Number | Percent | Percent |
| Vehicle | 58 | 39 | |
| Air/Republic of South Africa | 34 | 23 | 52 |
| Private charter | 25 | 17 | |
| Air/other Africa | 18 | 12 | 28 |
| Air/Europe | 11 | 7 | 17 |
| Air/Botswana | 2 | 1 | 3 |
| Other | 2 | 1 | |
| Total | 150 | 100 | 100 |

* Question 25 on the tourist questionnaire (Appendix A).

The question, "What is the name and address of your travel agent to whom you paid your package?" differs from a previous question(question 9b) concerning the percentage paid in their country of residence. Many (27 percent) of the respondents did not use a travel agent (Table 17). However, of the travelers who did use an agent, 25 percent of the respondents paid for their package in the Republic of South Africa, 20 percent within Botswana, 15 percent in the United States and 14 percent in the United Kingdom. Of the people who paid for a safari package through a travel agent, 20 percent paid in Botswana and 80 percent outside Botswana. It was not possible to estimate how much of the payments entered Botswana. A thorough study of the travel business dealing with Botswana in the UK, USA, RSA, and other European countries would help to clarify this issue further.

Two questions concerning the tourists' accommodation were asked. Responses to the question, "What type of accommodation did you stay in?" are reported in Table 18. A total of 214 responses were obtained for this question, which resulted because many tourists stayed in more than one type of accommodation. The tent was the most used accommodation (77 percent of the respondents), which was supplied by several of the permanent

TABLE 17. ORIGIN OF TRAVEL AGENCIES USED BY BOTSWANA TOURISTS (1989)*

| | Responses | | Percentage That |
|---|---|---|---|
| | Number | Percent | Used Travel Agent |
| None | 40 | 27 | |
| Rep. S. Africa | 27 | 18 | 25 |
| Botswana | 22 | 15 | 20 |
| United States | 17 | 11 | 15 |
| United Kingdom | 16 | 11 | 14 |
| Other Europe | 9 | 6 | 8 |
| Australia/NZ | 7 | 5 | 6 |
| Other Africa | 5 | 3 | 5 |
| Germany | 5 | 3 | 5 |
| Other World | 2 | 1 | 2 |
| Total | 150 | 100 | 100 |

* Question 26 on the tourist questionnaire (Appendix A).

TABLE 18. TOURIST ACCOMMODATION USED IN BOTSWANA (1989)*

| | Responses | |
|---|---|---|
| Type of Accommodation | Number** | Percent |
| Tent | 116 | 77 |
| Reed hut | 43 | 29 |
| Brick structure | 28 | 19 |
| Hotel | 17 | 1 |
| Other accommodation | 10 | 1 |
| Total | 214 | |

* Question 27 on the tourist questionnaire (Appendix A).
**Multiple responses were allowed.

camps and all of the mobile companies; independent travelers used tents. The rest of the accommodation types reed hut, brick structure, hotel, or other mainly represent where the "high-cost" tourist will stay. The majority of people received the expected accommodation, as the question, "Was your accommodation what you expected/preferred?" received 138 "yes" responses (92 percent). Tourists seemed to be quite satisfied with their accommodations, as the question, "Was your accommodation satisfactory?" received 134 "yes" responses (89 percent). The increase in park fees as of July 1, 1989 has been a point of controversy ever since the change was proposed. The government raised the park fees to reduce numbers of tourists, mainly the "low-cost" tourist, and increase or maintain the "high-cost" tourist numbers (Mothoagae 1990).

In general, the controversy has been split between the private sector that depends on the independent traveler (e.g., food shops, independent lodges, general business) and the permanent camps that cater to the "high-cost" tourist. The park fee increase could discourage independent travelers, which, in turn, will lower volume sold by the small businesses dependent on this market. The next question concerned the park fee increase and was asked of each targeted group (tourists, safari companies, and associated businesses). Only 19 percent of all tourists questioned said that the increase in park fees affected their plans negatively. Many people who were interviewed had already planned their holiday, so alterations were not as likely. However tourist number fluctuations in response to the fee increase should be monitored to see if the fee change affects numbers of independent tourists.

Another issue of interest was motorboat and aircraft noise, specifically in the Okavango Delta area. Conflicts between tourists and motorboat owners have been outlined in the Ecological Zoning Report, including motorboat versus mekoros (dugout canoes), erosion hazards in parts of the Delta, and noise disturbances (Snowy Mountains 1989). Nineteen percent of total respondents replied that noise was a problem (the majority of the tourists referred to motorboat noise). Seventeen percent of total respondents said that it did bother them to see numerous motorboats in the delta.

Depending on the areas of travel into the delta, one will use either mokoro (local dugout canoe), canoe, or motorboat. The motorboat (along with aircraft) is used extensively to transport clients out to the "remoter" camps. The mokoro and the canoe are used either for hire (for independent travelers) or at permanent camps for short trips into the delta. Sixty-five percent of the respondents used a mokoro, and 60 percent reported using a motorboat (Table 19). Some of the tourists (not going into the delta area) did not use any of the watercraft, or water transportation was not applicable to their holiday.

The increase in tourists in northern Botswana has been an area of interest for several years. Only eight respondents considered the area crowded.

The last question suggested by HATAB was meant to measure where and how long tourists holiday in northern Botswana. On average, 90 percent of all respondents spent some time in the Okavango Delta area, 51 percent in the Savuti/Linyanti[6] area, and 51 percent in Chobe National Park (areas near Kasane) (Table 20). The average amount of time spent in Ngamiland and Chobe districts (excluding central Kalahari) was nine days and in Botswana 12 days.

## Safari Companies

About 40 safari companies operate in northern Botswana (Sheller 1990). Of those 40, 20 companies responded, though in some cases not all questions were answered. There was a general

TABLE 19. TYPES OF WATERCRAFT USED BY TOURISTS IN BOTSWANA (1989)*

| | Responses | |
|---|---|---|
| | Number** | Percent |
| Mokoro | 98 | 65 |
| Motorboat | 90 | 60 |
| Canoe | 10 | 7 |
| Total | 198 | |

* Question 32 on the tourist questionnaire (Appendix A).
**Multiple responses were allowed.

[6]The Savuti/Linyanti area is in Chobe, however it was distinguished by the tourists as "Chobe" and "Savuti".

TABLE 20. AREAS AND NUMBER OF DAYS VISITED IN BOTSWANA BY TOURISTS (1989)*

| Area | # of Days | | Responses | |
|---|---|---|---|---|
| | Sum | Average | Number | Percent |
| Okavango Delta | 847 | 3 | 135 | 90 |
| Savuti/Linyanti | 192 | 3 | 76 | 51 |
| Chobe N.Park | 210 | 3 | 77 | 51 |
| Central Kalahari | 52 | 3 | 17 | 11 |
| Total | | 12 | | |

* Question 34 on the tourist questionnaire (Appendix A)
**Multiple responses were allowed.

reluctance or inability to answer many of the economic-based questions (income, capital/inventory investment, wages); however, data were collected from 15 photographic safari companies and five hunting/photographic companies. All five of the hunting companies stated that the hunters may bring along family or friends who do not hunt, thus classifying them as a company that offers both hunting and photographic services. Four of the five major hunting companies in northern Botswana responded. One professional hunter classified his photographic company as "both" (hunting and photographic).

## Company Profile

The majority (70 percent) of the safari companies had headquarters in Maun, Botswana (Table 21). Only 15 percent of the companies said that their headquarters were outside of Botswana.

Six companies of the 20 companies interviewed were located outside of northern Botswana. Locations in other African countries are Republic of South Africa, Zimbabwe, Namibia, Malawi, Zaire, and Tanzania. Some companies have started in another African country first, then moved to Botswana to take advantage of what the region has to offer. Five companies were located elsewhere in the world, United States, United Kingdom, Belgium, Sweden, and Scotland. In many cases, these countries

TABLE 21. HEADQUARTERS OF SAFARI COMPANIES OPERATING IN NORTHERN BOTSWANA (1989)*

| City | Responses Number | Percent |
|---|---|---|
| Maun, Botswana | 14 | 70 |
| Kasane, Botswana | 2 | 10 |
| Gaborone, Botswana | 1 | 5 |
| Houston, USA | 2 | 10 |
| Johannesburg, RSA | 1 | 5 |
| Total | 20 | 100 |

* Question 1 on safari companies questionnaire (Appendix A).

house the marketing offices for the company, where many of the clients pay the safari package fee.

## Clientele

This section identifies the origin of safari clientele and the number of clients safari companies accommodate annually.

Most (95 percent) of the safari companies reported clients from the United States and United Kingdom (Table 22). Seventy percent of the companies reported clients from Europe other than the United Kingdom. Sixty-five percent said clients came from the Republic of South Africa. Nearly 80 percent of the clients were from three countries; United States (34 percent), United Kingdom (23 percent) and Republic of South Africa (22 percent).

In 1989, 19 companies served 12,879 clients (Table 23). Several of the respondents were small companies, as many of the larger companies did not respond to the study. Therefore, the figures relating to client numbers may underestimate the true figures. The average was 678 clients per company in 1989. In comparison, 15 companies averaged 584 clients in 1988.

Sixty-eight percent of the clients were hunters (in 1989). All 20 companies have an average of 83 percent non-hunting clientele.

TABLE 22. CLIENTELE ORIGIN FOR BOTSWANA SAFARI COMPANIES (1989)*

| | Responses | | % of Clients |
| --- | --- | --- | --- |
| | Number | Percent | from Origin |
| United States | 19 | 95 | 34 |
| United Kingdom | 19 | 95 | 23 |
| Other Europe | 14 | 70 | 9 |
| Republic of South Africa | 13 | 65 | 22 |
| Germany | 7 | 35 | 8 |
| Other world | 5 | 25 | 2 |
| Other Africa | 3 | 15 | 1 |
| Australia/New Zealand | 3 | 15 | 1 |
| | | | 100 |

* Question 4 on the safari companies questionnaire (Appendix A).
**Multiple responses were allowed.

Safari Companies' Income and Expenditures

This section of the questionnaire was intended to estimate the employment, income, and expenditures resulting from the tourism industry. Economic information, such as wages and income, was obtained in pula, and thus is reported in the tables in pula. This was done for convenience to safari operators and

TABLE 23. NUMBERS OF CLIENTS SERVED BY BOTSWANA SAFARI COMPANIES IN 1989, 1988, AND 1984*

| | Clients served | | |
| --- | --- | --- | --- |
| | 1989 | 1988 | 1984 |
| # Responses | 19 | 15 | 11 |
| Sum | 12,879 | 8,753 | 2787 |
| Average | 678 | 584 | 254 |

*Question 6a on the safari companies questionnaire (Appendix A).

ease in gathering information. The total figures are reported in both U.S. dollars and Botswana pula.[7] Information such as numbers of workers, days worked per year, resident status, and annual wages were gathered for the 20 companies interviewed. Five groups of employees were examined, including professional hunters and guides, safari support, office management, office support, and other employees (Tables 24-27).

Twelve companies employed 727 employees with an average of 61 employees per company. Residence status was requested with three categories: Ngamiland/Chobe resident (Botswana resident residing in Ngamiland or Chobe), Botswana resident (not residing in the two districts), or non-resident. Fourteen reported an average of 99 percent were Ngamiland or Chobe district guides. Two companies said that 60 percent of their "guides" were non-residents.

"Safari support" worker numbers were reported by 19 companies. Eighteen respondents said that 99 percent of them were residents and one respondent reported that 60 percent of the support workers were non-resident.

All three categories, "Office Management," "Office Support," and "Other Employees," responded that all workers in these categories were non-residents.

TABLE 24. NUMBER OF WORKERS FOR BOTSWANA SAFARI COMPANIES (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Prof. Hunters and Guides | 91 | 16 | 6 |
| Safari Support | 499 | 18 | 28 |
| Office Management | 27 | 13 | 2 |
| Office Support | 43 | 9 | 5 |
| Other Employees | 67 | 5 | 13 |
| Total | 727 | Avg = 12 | 61 |

* Question 5 on the safari companies questionnaire (Appendix A).

[7]Exchange rate: 1.89 Botswana pula to 1.0 United States dollar

TABLE 25. RESIDENCE STATUS OF EMPLOYEES FOR BOTSWANA SAFARI COMPANIES (1989)*

| | # Responses | Average Percent |
|---|---|---|
| Prof. Hunters and Guides | | |
| Ngami/Chobe residents** | 14 | 99 |
| Non-residents | 2 | 60 |
| Safari Support | | |
| Ngami/Chobe residents | 18 | 99 |
| Non-residents | 1 | 25 |
| Office Management | | |
| Ngami/Chobe residents | 9 | 100 |
| Non-residents | 3 | 100 |
| Office Support | | |
| Ngami/Chobe residents | 7 | 100 |
| Non-residents | 1 | 100 |
| Other Employees | | |
| Ngami/Chobe residents | 3 | 100 |
| Non-residents | 0 | 100 |

* Question 5 on the safari companies questionnaire (Appendix A).
**This question did not distinguish between citizen and resident, only between non-resident and resident residing in Ngamiland or Chobe districts.

The total number of days worked annually per company was 1,264 by an average of 12 companies. Total wages for the 12 companies that responded to this question was P1,881,369 ($995,433) and average of P156,781 per company. Total wages paid by the 40 safari companies would be P6,271,240 in 1989.[8]

[8]Average annual wages P156,781 per company multiplied by 40 companies = P6,271,240 ($3,318,116) were paid by Botswana safari companies in 1989.

TABLE 26. EMPLOYEE DAYS WORKED ANNUALLY FOR BOTSWANA SAFARI COMPANIES (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Prof. hunters and guides | 3,439 | 15 | 229 |
| Safari support | 4,343 | 18 | 241 |
| Office management | 3,669 | 12 | 306 |
| Office support | 2,429 | 9 | 270 |
| Other employees | 1,290 | 5 | 258 |
| Total | 15,170 | Avg=12 | 1,264 |

* Question 5 on the safari companies questionnaire (Appendix A).

TABLE 27. ANNUAL WAGES PAID BY BOTSWANA SAFARI COMPANIES (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Prof. hunters and guides | 501,455 | 15 | 33,430 |
| Safari support | 1,096,370 | 18 | 60,909 |
| Office management | 187,111 | 12 | 15,593 |
| Office support | 87,766 | 9 | 9,752 |
| Other employees | 8,667 | 5 | 1,733 |
| Total Pula | 1,881,369 | Avg=12 | 156,781 |
| U.S. dollar | $ 995,433 | | $ 82,953 |

* Question 5 on the safari companies questionnaire (Appendix A).

To get an idea of the turnover rate among employees, an average of 79 percent of the employees worked for the same company last year, according to the 16 respondents.

Seventeen companies had an annual gross income of P14,884,458 with an average of P875,556. Total annual gross income for all safari companies was P35,022,240 ($18,530,285) before taxes in 1989.[9]

Economic impact is concerned with expenditures as well as income. This section of the questionnaire was meant to quantify the major expenses for safari companies operating in northern Botswana. Expenses could include food and beverages, vehicles (fuel, repairs, and maintenance), taxes and fees paid to the government, labor, and other miscellaneous expenditures that occur (Table 28).

Food and beverages, labor, and the accumulation of other expenses were the major expenditures for the responding

TABLE 28. BOTSWANA SAFARI COMPANIES' 1989 EXPENDITURES*

| | Sum | # Responses | Average |
|---|---|---|---|
| Food & beverages | 1,576,248 | 19 | 82,960 |
| Vehicles pur/lease | 492,854 | 13 | 37,912 |
| Veh. repairs/maint. | 969,068 | 18 | 53,837 |
| Veh. fuel/oil | 600,446 | 19 | 31,602 |
| Labor | 2,008,879 | 19 | 105,730 |
| Govt fees/taxes | 971,721 | 16 | 60,733 |
| Rent | 33,044 | 12 | 2,754 |
| Other expenses | 1,653,587 | 10 | 165,359 |
| 1988 Park fees | 74,800 | 10 | 7,480 |
| 1989 Park fees | 305,558 | 12 | 25,463 |
| Total Expenses | P8,686,205 | Avg=15 | P579,080 |
| Total U.S. $ (1.89) | $4,595,876 | | $306,392 |

* Question 9 on the safari companies questionnaire (Appendix A).

[9]Most companies could estimate their 1989 annual income; however, a couple of companies gave their 1988 estimates.

safari companies. Food and beverage items totaled P1,576,248, a major expense item.[10] Keeping a reliable supply in stock at all times is difficult, adding to the cost. Labor was a major item of expense because the tourist industry is labor intensive. "Other expenses" that accumulated a large share of the total expenses included items such as communications (phone, FAX, telex), marketing (mainly in Europe, RSA, or USA), equipment, and overhead costs.

Average annual income accumulated by the average safari company was equal to P875,556 with a total for all safari companies of P35,002,240 (Table 29). The average expenditure for a safari company in 1989 was estimated at P579,080 with a total for all equal to P23,163,200.[11] This difference in income and expenditures reported by the safari companies was net profit which was estimated at P11,859,040.

Non-Resident Hunting Figures

Botswana Outfitters and Professional Hunter's Association (BOPHA) is an organization of members of the hunting industry and other interested parties. The facts and figures concerning non-resident hunting in Botswana for 1986-1988 with estimates for

TABLE 29. BOTSWANA SAFARI COMPANIES' INCOME AND EXPENDITURES (1989)*

| | # Responses | Total Companies | Average | Total |
|---|---|---|---|---|
| Income | 17 | 40 | 875,556 | P35,022,240 |
| Expenditures | 15 | 40 | 579,080 | P23,163,200 |
| Net Profit (pula) | | | | P11,859,040 |
| US $ (1.89) | | | | $ 6,274,624 |

* Questions 8 and 9 on the safari companies questionnaire (Appendix A).

[10]These items are generally imported from the Republic of South Africa.

[11]Most companies estimated their 1989 expenditures; however, a couple of the companies reported 1988 estimates.

1989 were obtained (from the president of that organization) and were summarized in this section. The number of companies used in the BOPHA estimates was unknown; however, there were five major hunting companies. The estimates given by BOPHA are assumed to include the five largest companies. The estimates obtained in this study, labeled "Borge 1989" in Table 30 were obtained from four of the five largest hunting companies.[12]

Total gross earnings for the hunting industry ranged from P9,000,000 in 1986 to P9,450,000 in 1988 with an estimate of P10,340,000 for 1989 (Table 30). The hunting companies interviewed for this economic study gave total earnings for five companies as P8,779,316, which was low even for BOPHA's 1986 figures. Total expenses for the BOPHA were P8,474,000, and the estimates that the hunting companies (1989) provided was P4,330,269. It was difficult to believe that the expenditures for 1988 really declined by approximately P4 million; however, it could be that the hunting companies interviewed accidentally underestimated their expenditures and they may have inadvertently not included some other expenses. The largest difference between the two estimates was in vehicle repairs/maintenance (P2,031,745) and vehicle fuels (P1,123,000). Labor estimates accounted for P806,000 difference in the two, and the total fees paid to the government (excluding park fees) was the closest with a difference of P291,371. Estimates of the number of employees for both studies were similar: BOPHA reported 429 for 1988, and hunting companies reported 437 employees in the 1989 survey.

## Safari Companies' General Perceptions

The question, "What changes do you have planned for your company in the next 5 years?" obtained the following responses (Table 31).

Several (30 percent) of the companies said that expansion, diversification, and upgrading the existing facilities would be included in future plans. Some of the businesses were making changes such as increased international marketing, and some said that plans were on hold until the new tourism policy is formally released. All companies except one (95 percent) responded that tourism has increased in the past five years, and the average increase was approximately 141 percent. The one response indicating a decrease in tourism related this decrease solely to the increased park fees as of July 1, 1989. Even though the

[12]One professional hunter classified his photographic company as both hunting and photographic, therefore the total hunting companies included in the analysis was five.

TABLE 30. HUNTING COMPANIES' INCOME AND EXPENDITURES (1989) COMPARED WITH BOTSWANA OUTFITTERS AND HUNTERS ASSOCIATION (1988)

| | Totals 1988 BOPHA* | 1989 Borge Totals | 1989 Borge Number of Responses | Difference 1988-1989 |
|---|---|---|---|---|
| **Income**: | | | | |
| Annual income | 9,450,000 | 8,779,316 | 5 | 670,684 |
| **Expenses**: | | | | |
| Labor | 2,079,000 | 1,273,000 | 5 | 806,000 |
| Food/beverages | 1,006,000 | 470,200 | 5 | 535,800 |
| Vehicle fuels | 1,273,000 | 150,000 | 5 | 1,123,000 |
| Vehicle repair | 2,280,000 | 248,255 | 4 | 2,031,745 |
| Total fees | 930,000 | 638,629 | 4 | 291,371 |
| Other | 906,000 | 1,263,685 | 3 | -357,685 |
| (Total Employees | 429 | 437 | | -8) |
| Vehicles (Purchased/leased) | | 282,600 | 4 | |
| Park fees (1988) | | 200 | 1 | |
| Park fees (1989) | | 800 | 1 | |
| Rent | | 2,100 | 2 | |
| Total Expenses | P8,474,000 | P4,330,269 | | P4,430,231 |
| Total Income | P9,450,000 | P8,779,316 | 5 | P670,684 |

* The number of hunting companies included in BOPHA data is unknown; however, there are five major hunting companies in Botswana and this is assumed to be the sample size.reported 437. The two sets of data are presented in Table 30, where all figures are estimated in Botswana pula.

question stated "in the last 5 years," the respondent thought that this decrease was significant enough to mention.

Most (18) referred to the wilderness of the Okavango Delta and the national parks of Botswana as the major reason why they established in Botswana. Photo safaris were the key service for many (16) of the companies, as Botswana is the ideal place for this business. Only two companies responded to establishing their company in the area because they "live here."

TABLE 31. BOTSWANA SAFARI COMPANIES' FUTURE FIVE-YEAR PLANS*

| | Responses | |
|---|---|---|
| | Number | Percent |
| Diversify and expand | 6 | 30 |
| Consolidate/reduce capacity | 3 | 15 |
| Upgrade | 6 | 30 |
| Increase international marketing | 5 | 25 |
| No changes/stay the same | 1 | 5 |
| Don't know/wait for tourism policy | 5 | 25 |
| | 26** | |

* Question 10 on the safari companies questionnaire (Appendix A).
**Multiple responses were allowed.

Thirty-two felt a need for more tourism and 25 for less tourism development (Table 32). This reflects that most companies desired more development; but, of these companies, 50 percent wanted "more, but controlled" development for the region.

Of the respondents who implied a need for less tourism development for the region, 55 percent thought that the environment may be in danger with increased growth of the industry.

The majority of responses (59 percent) identified government as an impediment (Table 33). "Government in general," "the absence of a tourism policy," "negative attitude of the government," and "poor park facilities" were the most prevalent answers.

Major advantages to increased tourism included wildlife (diversity, abundance, easy to find), parks, and unspoiled wilderness, accounting for 90 percent of the responses. Ninety percent of all respondents thought that wildlife was the most important advantage (Table 34).

Sixty percent of the respondents were not affected by the July 1, 1989, increase in park fees.[13] Thirty percent of the

[13]Question 16 on the safari companies questionnaire (Appendix A), which was suggested by HATAB.

TABLE 32. BOTSWANA SAFARI COMPANIES' PREFERENCES FOR MORE OR LESS TOURISM GROWTH (1989)*

| | Responses | |
|---|---|---|
| | Number | Percent |
| More in general | 13 | 65 |
| Why? | | |
| No development as of yet | 3 | 15 |
| Employment | 1 | 5 |
| Parks are under utilized | 3 | 15 |
| More high quality lodges | 2 | 10 |
| More, but controlled | 10 | 50 |
| Less in general | 7 | 35 |
| Why? | | |
| Facilities can't handle demand | 7 | 35 |
| Danger to the environment | 11 | 55 |

* Question 13 on the safari companies questionnaire (Appendix A).
**Multiple responses were allowed.

companies said their business was negatively affected, and two companies said that they were affected in a positive manner.

## Tourism-Associated Businesses

Tourism-related businesses are the focus of this section. Of the 48 companies contacted, 34 companies responded, 24 from Maun (in Ngamiland) and 10 (in Chobe) from Kasane. The population size for tourism-associated businesses in northern Botswana was assumed to be 48. Examples of information sought were type of service, location and expansion range of the company, economic information, and general perceptions concerning the tourism industry in northern Botswana.

### Company Profile

Most (44 percent of respondents) services offered were in the "food and beverage" and "other" categories (Table 35). Many of the businesses surveyed offered more than one service; for example, a hotel/lodge usually served food and beverages and

TABLE 33. MAJOR IMPEDIMENTS OF BOTSWANA FOR THE TOURISM INDUSTRY EXPRESSED BY SAFARI COMPANIES (1989)*

| Impediments | Responses Number | Responses Percent |
|---|---|---|
| Government | 18 | 90 |
| No tourism policy | 14 | 70 |
| Expenses/costs | 14 | 70 |
| Neg. attitude of gov't. | 14 | 14 |
| Poor park facilities | 10 | 50 |
| Customs/immigration | 10 | 50 |
| Lack of trained staff | 9 | 45 |
| High park fees | 5 | 25 |
| Communications | 5 | 25 |
| Lodging quality | 4 | 20 |
| Lodging/cost of | 4 | 20 |
| Transport/international | 3 | 15 |
| Transport/air | 3 | 15 |
| Licensing | 3 | 15 |
| Transport/local | 2 | 10 |
| Transport/connections | 2 | 10 |
| Image of Botswana | 2 | 10 |
| Health concerns | 2 | 10 |
| Transport/land | 1 | 5 |
| Lodging/number of | 1 | 5 |
| Total | 126** | |

* Question 14 on the safari companies questionnaire (Appendix A).
**Multiple responses were allowed.

provided lodging. The "other" (41 percent of respondents) category included wholesale selling, general trading, boat and vehicle hire, taxidermy, and other miscellaneous services.

All of the companies interviewed reported that their headquarters were in Botswana. The majority (58 percent) of companies had offices in Maun, 21 percent in Gaborone, and 21 percent in Kasane.

TABLE 34. MAJOR ADVANTAGES OF BOTSWANA FOR THE TOURISM INDUSTRY EXPRESSED BY SAFARI COMPANIES (1989)*

| Advantages | Responses Number | Percent |
|---|---|---|
| Wildlife | 18 | 90 |
| W/diversity | 11 | 55 |
| W/abundance | 9 | 45 |
| W/easy to find | 2 | 10 |
| Transport/connections | 1 | 5 |
| Small facilities | 3 | 15 |
| People | 1 | 5 |
| Parks | 8 | 40 |
| Other | 2 | 10 |
| Unspoiled wilderness | 15 | 75 |
| Total | 70 | |

* Question 15 on the safari companies questionnaire (Appendix A).
**Multiple responses were allowed.

TABLE 35. SERVICES OFFERED BY BOTSWANA BUSINESSES INTERVIEWED (1989)*

| | Responses Number | Percent |
|---|---|---|
| Lodging | 8 | 24 |
| Food & Beverage | 15 | 44 |
| Transport | 8 | 24 |
| Souvenir Shop | 4 | 12 |
| Other | 14 | 41 |
| TOTAL responses | 49 | |

* Refer to local services industry questionnaire "Type of Service" (Appendix A).
**Multiple responses were allowed.

Six companies were located elsewhere in Africa, i.e., Republic of South Africa and Zimbabwe. Only two companies, businesses exist outside of Africa in the United Kingdom, Belgium, Sweden, and Germany.

The oldest company was established in 1958 and the youngest was started in 1987, the average year was 1978.

Most of the respondents (82 percent) said that an average of 73 percent of their clients are from Botswana. Forty-seven percent of the respondents reported 25 percent were from Republic of South Africa, and 15 companies said 42 percent were from European countries (Table 36). This large percentage of clients from Botswana was expected because much of the business was used by locals, specifically those businesses associated with food and beverages.

TABLE 36. CLIENTELE ORIGIN OF BOTSWANA ASSOCIATED BUSINESSES (1989)*

| | Responses | | |
|---|---|---|---|
| | Number | Percent | Average % |
| Botswana | 28 | 82 | 73 |
| Republic of South Africa | 16 | 47 | 25 |
| Other Europe | 14 | 41 | 17 |
| United States | 10 | 29 | 18 |
| United Kingdom | 9 | 26 | 11 |
| Other Africa | 9 | 26 | 14 |
| Other World | 4 | 12 | 17 |
| Germany | 1 | 3 | 25 |
| Total | 91 | | |

* Question 4 on the local services industry questionnaire (Appendix A).
**Multiple responses were allowed

Associated Businesses' Income and Expenditures

This section of the questionnaire was intended generally to estimate the employment associated with the tourism industry. The economic information such as wages, income, and other expenses was gathered in pula for ease of obtaining data. The total figures are reported in both U.S. dollars and in pula. Information such as numbers of workers, days worked per year, resident status, and annual wages was gathered for the 34 companies interviewed. Three groups of employees were examined with respect to information needed, including office management, office support, and other employees (Tables 37-40).

On average, 25 companies responded to the "number of employees" for a total of 742 employees. The average number of days worked annually was 278 and was answered by an average of 16 companies. Total wages for the 20 companies that responded to this question were P3,052,068 (US $1,614,851).

In this section, the question concerning residency did not include the term "citizen;" therefore citizens and residents were used interchangeably compared to non-residents. The majority (19) of responses concerning "Office Management" workers said that 93 percent of this group were Ngami/Chobe (Ng/Ch) residents, three responses reported 67 percent were residents, and four responses said 60 percent were non-residents. "Office Support" (OS) workers were represented by 12 responses averaging 99

TABLE 37. NUMBER OF WORKERS EMPLOYED BY BOTSWANA ASSOCIATED BUSINESSES (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Office Management | 73 | 29 | 3 |
| Office Support | 116 | 17 | 7 |
| Other Employees | 553 | 29 | 19 |
| | ----- | ---- | ---- |
| Total | 742 | 25 | 30 |

* Question 5 on the local services industry questionnaire (Appendix A).

TABLE 38. RESIDENCE STATUS OF EMPLOYEES FOR BOTSWANA ASSOCIATED BUSINESSES (1989)*

| | # Responses | Average Percent |
|---|---|---|
| Office Management | | |
| Ngami/Chobe residents | 19 | 93 |
| Residents** | 3 | 67 |
| Non-residents | 4 | 60 |
| Office Support | | |
| Ngami/Chobe residents | 12 | 99 |
| Residents | 1 | 20 |
| Non-residents | 0 | |
| Other Employees | | |
| Ngami/Chobe Residents | 23 | 95 |
| Residents | 3 | 42 |
| Non-residents | 0 | |

* Question 5 on the local services industry questionnaire (Appendix A).
**"Residents" means residents of Botswana, but not of Ngamiland or Chobe districts; "resident" is used interchangeably with citizen in this table.

percent Ng/Ch residents, and one company said that 20 percent of his "OS" workers were residents not residing in either district. Of the 26 "Other Employees" responses, 23 reported an average of 95 percent were Ng/Ch residents and three companies said that 42 percent of this group of employees were residents.

This section of the questionnaire was meant to quantify the expenses for tourism-related companies operating in northern Botswana. Expenses could include food and beverages, vehicles (fuel, repairs, and maintenance), taxes and fees paid to the government, labor, and other miscellaneous expenditures that occur (Table 41).

Vehicles (purchased or leased), goods for resale, labor, and food and beverages were the major expenses for the responding businesses. Vehicles accounted for P8,361,600 (34 percent) of the total expenditures, while goods for resale totalled

TABLE 39. EMPLOYEE DAYS WORKED ANNUALLY FOR BOTSWANA ASSOCIATED BUSINESSES (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Office Management | 5,507 | 19 | 290 |
| Office Support | 2,536 | 10 | 254 |
| Other Employees | 5,795 | 20 | 290 |
| | -------- | ------ | ---- |
| Total | 13,838 | Avg=16 | 865 |

* Question 5 on the local services industry questionnaire (Appendix A).

TABLE 40. ANNUAL WAGES PAID BY BOTSWANA ASSOCIATED BUSINESSES IN PULA (1989)*

| Category | Sum | # Responses | Average |
|---|---|---|---|
| Office Management | 921,879 | 22 | 41,904 |
| Office Support | 391,918 | 14 | 27,994 |
| Other Employees | 1,738,271 | 24 | 72,428 |
| | ------------ | ------ | -------- |
| Total Pula | P3,052,068 | Avg=20 | P152,603 |
| Total U.S. $ (1.89) | $1,614,851 | | $ 80,742 |

Average P152,603 per business multiplied by 48 companies is equal to P7,324,944 ($3,875,632) spent by businesses in wages for 1989.[14]

* Question 5 on the local services industry questionnaire (Appendix A).

[14] It is assumed that associated industries that did not respond to economic-related questions, would have similar economic information.

TABLE 41. BOTSWANA ASSOCIATED BUSINESSES 1989 EXPENDITURES*

| | Sum | # Responses | Average |
|---|---|---|---|
| Food & beverages | 2,339,622 | 23 | 101,723 |
| Vehicles pur/lease | 8,361,600 | 17 | 491,859 |
| Veh. repairs/maint. | 486,868 | 26 | 18,726 |
| Veh. fuel/oil | 450,866 | 25 | 18,035 |
| Labor | 2,324,855 | 23 | 101,081 |
| Gov't. fees/taxes | 868,503 | 24 | 36,188 |
| Goods for resale | 7,676,617 | 18 | 426,479 |
| Rent | 339,672 | 17 | 19,981 |
| Utilities | 221,728 | 12 | 18,477 |
| Other expenses | 1,166,780 | 16 | 72,924 |
| Total Expenses | P24,237,111 | Avg=20 | P1,211,856 |
| Total U.S. $ (1.89) | $12,823,868 | | $641,193 |

* Question 6 on the local services industry questionnaire (Appendix A).

P7,676,617 (32 percent). Labor and food and beverage items were major expense items, together accounting for P4,664,477. "Other expenses" included items such as communications (phone, FAX, telex), equipment, and running costs.

Most of the companies said that nothing was directly imported;[15] the following table shows the responses of those who did directly import goods (Table 42).

Twenty-two companies responded to a question about their annual gross income. The sum of the replies was P21,331,945 (US $ 11,286,743) with an average of P969,634. Total annual income and expenditures for 48 tourism-related businesses is reported in Table 43.

The average annual income generated by a business involved with tourism was reported to be P969,634. Total annual income

[15]Most everything is indirectly imported from the Republic of South Africa.

for 48 companies was estimated to be P46,542,432. Expenditures for the average business was P1,211,856 with a total for all annual expenditures for all industries at P58,169,088. There was no net profit generated for 1989.

Not all responded to the question, "What were the company's investments in 1989?" Only 10 companies replied to "capital investment?" with an average of P323,119, whereas six responses were obtained for "inventory investment?" with an average of

TABLE 42. PERCENTAGE OF GOODS IMPORTED DIRECTLY BY BOTSWANA ASSOCIATED BUSINESSES (1989)*

| | Responses | | |
|---|---|---|---|
| | Number | Percent | Average % |
| Most goods | 0 | 0 | |
| Food and beverages | 2 | 6 | 95 |
| Veh. purchased/Leased | 1 | 3 | 100 |
| Other expenses | 4 | 12 | 66 |
| | ---- | | |
| Total | 7 | | |

* Question 6 on the local services industry questionnaire (Appendix A).

TABLE 43. ANNUAL INCOME AND EXPENDITURES FOR BOTSWANA ASSOCIATED BUSINESSES (1989)

| | Responses | Average | Total Companies | Total |
|---|---|---|---|---|
| Income | 22 | P969,634 | 48 | P 46,542,432 |
| Expenditures | 20 | P1,211,856 | 48 | P 58,169,088 |
| | | | | ------------ |
| Net Profit | | | | P-11,626,656 |

P91,303. If it is assumed that the capital investment estimate per company was P323,119, and this applies to all 48 companies, the total capital investment would be P15,509,712. If the same assumptions apply for inventory investment, then total inventory investment would be (P91,303 x 48 companies) P4,382,544. Since so few companies responded to this question, these total figures should be viewed with caution.

## Associated Businesses' General Perceptions

Twenty-nine respondents thought that tourism had increased 57 percent. Only three respondents indicated that tourism has decreased an average of 30 percent.

Twenty-six respondents indicated a need for more growth in tourism with many reporting multiple responses (Table 44). Less tourism development was favored by eight respondents (Table 45). This large number of responses for more tourism development

TABLE 44. BOTSWANA ASSOCIATED BUSINESS EXPRESSIONS FOR MORE TOURISM GROWTH (1989)*

| | Responses | |
|---|---|---|
| | Number | Percent |
| More tourism generally | 26 | 76 |
| only controlled development | 16 | 47 |
| local employment | 9 | 26 |
| improve parks facilities | 8 | 24 |
| increased foreign exchange | 7 | 21 |
| improve quality lodges/less # | 6 | 18 |
| much of delta untouched | 4 | 12 |
| more government development | 4 | 12 |
| improve communications | 2 | 6 |
| less hunting/more photo safaries | 2 | 6 |
| localize existing companies | 1 | 3 |
| | ---- | |
| Total | 85 | |

* Question 10 on the local services industry questionnaire (Appendix A).
**Multiple responses were allowed.

TABLE 45. BOTSWANA ASSOCIATED BUSINESS EXPRESSIONS FOR LESS TOURISM GROWTH (1989)*

| | Responses | |
|---|---|---|
| | Number | Percent |
| Less tourism generally | 8 | 24 |
| Environmental damage | 6 | 18 |
| Limit # of people in parks | 5 | 15 |
| | ---- | |
| Total responses | 19 | |

* Question 10 on the local services industry questionnaire (Appendix A).

reflects that most companies desire more growth, but of these responses, 47 percent want "controlled development" only. Of the responses that implied a need for less tourism development for the region, 18 percent thought that the environment may be in danger with increased growth of the industry.

The majority of respondents (61 responses) thought government was one of the major impediments (Table 46). Government-related categories included "government," "high park fees," "image of Botswana," "poor park facilities," "customs and immigration," "tourism is poorly managed by the government," "no government marketing," and "strict government licensing." Local costs, transport, and lodging, were impediments raised by several of the respondents.

Thirty-three responses covering the major advantages to increased tourism included 82 percent of the replies involving parks or wilderness (Table 47).

Increased park fees affected 17 companies, three positively and 14 negatively. Of all the respondents, 43 percent were not affected by the increase in park fees at all.

This last section was answered only by the hotels and lodges. The questions were concerned with capacity and occupancy

TABLE 46. MAJOR IMPEDIMENTS OF BOTSWANA FOR TOURISM EXPRESSED BY TOURISM ASSOCIATED BUSINESSES (1989)*

| Impediments | Responses Number | Responses Percent |
|---|---|---|
| Government | 24 | 71 |
| Local costs | 22 | 65 |
| Transport | 16 | 47 |
| Lodging | 13 | 38 |
| High park fees | 9 | 26 |
| Health concerns | 8 | 24 |
| Communications | 8 | 24 |
| Transport/land | 8 | 24 |
| Image of Botswana | 7 | 21 |
| Lodging/costs | 6 | 18 |
| Transport/air | 5 | 15 |
| Environmental damage | 5 | 15 |
| Poor facilities | 5 | 15 |
| Customs/immigration | 5 | 15 |
| Tourism is poorly managed by the government | 5 | 15 |
| Transport/local | 4 | 12 |
| Lodging/quality | 4 | 12 |
| Too many people | 4 | 12 |
| No government marketing | 4 | 12 |
| Transport/international | 3 | 9 |
| Lack of trained staff | 3 | 9 |
| Lodging/numbers | 2 | 6 |
| Strict government licensing | 2 | 6 |
| Transport/connections | 1 | 3 |
| | ----- | |
| Total responses | 173 | |
| Total respondents | 34 | |

* Question 11 on the local services industry questionnaire (Appendix A).
**Multiple responses were allowed.

of the lodge or hotel. Seven companies had an average capacity of 43, 51 percent per year at full capacity, and average occupancy of 53 percent.

TABLE 47. MAJOR ADVANTAGES OF BOTSWANA FOR TOURISM EXPRESSED BY ASSOCIATED BUSINESSES (1989)*

| Advantages | Responses Number | Percent |
|---|---|---|
| Parks | 11 | 32 |
| Unspoiled wilderness | 17 | 50 |
| Freedom to do as you wish | 3 | 9 |
| Stable government | 2 | 6 |
| | ---- | |
| Total | 33 | |

* Question 12 on the local services industry questionnaire (Appendix A).

## Comparisons and Compilation of all Sectors

This purpose of this section was to present the comparable economic data on tourists, safari companies, and associated businesses. Client and company profiles and general perceptions are not included in this section.

Table 48 displays the direct employment impact (number of workers and wages) of Botswana safari companies and associated businesses in 1989.

TABLE 48. NUMBER OF EMPLOYEES AND WAGES PAID FOR BOTSWANA SAFARI COMPANIES AND ASSOCIATED BUSINESSES IN 1989

| | Average No. Workers | Average Wages | Average No. of Responses | Number of Companies | Total Workers | Total Wages |
|---|---|---|---|---|---|---|
| Safari companies | 61 | 156,781 | 12 | 40 | 2,423 | 6,271,240 |
| Associated bus. | 30 | 152,603 | 25 | 48 | 1,425 | 7,324,944 |
| Total | | | | | 3,848 | P13,596,184 |

Data concerning the employment sector for the tourism industry is lacking; however, Fowkes (1985) estimated that total wages paid in 1984 for 1,032 employees was P3.2 million. This is an average of P3,100 per employee. The data collected for this study concerning annual wages for 1989 totalled P13,596,184 for 3,848 workers. This averages P3,533 per employee.

Tourists spent P177,982,456 for private goods and services associated with wildlife based tourism in northern Botswana in 1989 (Table 49). They paid P3,386,880 (included in P177,982,456) in park fees in addition to fees paid via the safari companies. Total direct impact on the public sector is estimated to be P8,571,744.

As illustrated in Table 49, there is substantial difference between safari income based on tourist responses and income as reported by safari companies. A portion of the difference may be due to income not received within the country; however, this is only speculation.

"High-" and "low-" cost tourists spent P177,982,456 in Botswana in 1989. This estimate does not include the unknown percentage of revenue that does not reach Botswana nor the expenses paid outside Botswana. This figure is larger than estimates (P61,642,000) in previous studies (CSO 1989); however, these estimates are based on 150 tourists interviewed in 1989, which were assumed to represent the population. The CSO estimated that P61,642,000 was the total tourist expenditure in 1988, with an average travel expense of about P181 per visitor (340,436 visitors), who averaged 4.9 days in Botswana and spent P37 daily. In comparison, the average daily (average nine days) expense found in this study for "high-cost" tourists in northern Botswana was P404, and the average daily expense for low-cost tourists was P170.[16] The figure of P177 million only represents "holiday" (64,000) tourists, while the P61 million figure CSO presented represents all visitors.

In addition to this public sector estimate, Appendix D gives an overall estimate of park fees paid to Botswana (the Department of Wildlife and National Parks) for January through November, 1989. The park permit data should be used only as a reference and general estimate (see Limitations) and are not in addition to the estimates above.

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[16]High cost: 188 + 26 = $214; Low cost: 44 + 46 = $90 see Tables 5 and 8 for reference.

TABLE 49. PRIVATE AND PUBLIC SECTOR ECONOMIC IMPACTS, BOTSWANA, 1989.

| | Private Sector | Public Sector** |
|---|---|---|
| Tourists (64,000) | | |
| Paid to safari Co. | P141,078,859* | |
| Other expenses | P36,903,597 | |
| Additional park fees | | P3,386,880 |
| | ------------- | |
| Total | P177,982,456 | |
| Safari Companies (40) | | |
| 1989 Income | P35,022,240 | |
| 1989 Expenses | P23,163,200 | |
| Gov't. Fees/Taxes | | P2,429,320 |
| Park Fees | | P1,018,520 |
| Associated Business (48) | | |
| 1989 Income | P46,542,432 | |
| 1989 Expenses | P58,169,088 | |
| Gov't. Fees/Taxes | | P1,727,024 |
| | | ------------ |
| | | P8,571,744 |

*This estimate does not account for the unknown percentage of revenue that does not reach Botswana, or the revenue that leaves Botswana.

**The Public Sector estimates are included within the private sector figures. It is the portion of income received by the private sector which was transferred to the public sector in the form of fees and taxes.

## Conclusions

Botswana is becoming an increasingly popular holiday destination for tourists who want to experience "wild Africa." Wildlife and wilderness are the key attractions to tourists visiting Botswana, including Chobe National Park in the northeast and Moremi Wildlife Reserve along with the Okavango Delta in the north. With an ever-expanding industry that is still quite young, more reliable information is necessary to assist decision makers in formulating policy.

The focus of this project was to estimate the impact tourism has on the economy of two districts in northern Botswana. Economic as well as general perceptual information was gathered from three components of the tourism trade: tourists, safari companies, and businesses associated with tourism. In addition, park entry permits for two National Parks were gathered (for January - November, 1989), analyzed, and compared to Hill's (1988) parks data.

The estimated impact of tourism on the private and public sectors of the economy of Botswana was found to be quite large. The direct economic contribution made by the tourists was P177,982,456. This estimate did not include an unknown percentage of revenue that does not reach Botswana due to safari packages which are paid in the tourist's country of residence. Nevertheless, this estimate does indicate that the tourist trade is important to the economy of northern Botswana.

Safari companies' reported revenue was approximately P35,022,240. An unknown percentage of this revenue is not spent directly in Botswana; however, the revenue that is likely to stay in the country includes payments for government fees/taxes, park fees, rent, and labor. Businesses associated with tourism received a total revenue of P46,542,432 in 1989. As before, an unknown percentage of this is spent outside Botswana; however, expenses such as government fees/taxes rent, and labor are spent directly in the region. All three groups (tourists, safari companies, and associated businesses) paid a total of P8,571,744 to the government of Botswana in fees/taxes, and park fees in 1989.[17]

Based on the park permit data (separate from questionnaire data) in Appendix D, it was estimated that the government of Botswana received P718,777 from two national parks in this region for 11 months in 1989. This was a considerable increase from the 1987 estimate of P266,857 (Hill 1988). This increase was due solely to the July 1, 1989 increase in park entry fees, because the number of people in 1987 (29,972) was greater than the number of people in 1989 (23,158).

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[17]This estimate was included in the expenditures listed above; therefore, this was not intended to be interpreted as a separate figure.

The tourism industry in Botswana has grown considerably in the past 5 to 10 years and needs controls to regulate this trade. With the new "Tourism Policy Paper"[18] released by the government of Botswana, some controls may be put into effect. The tourism trade can be economically beneficial to Botswana, but it could be detrimental to the environment if some regulations are not put into effect immediately. Controls are not efficient unless they are enforced. If the government of Botswana sets up the rules for the tourism trade in northern Botswana and enforces them, growth in this industry could benefit the country as well as the private sector.

[18]See Appendix E for the major points outlined in the Policy Paper.

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# APPENDIX A

## Survey Instruments

I.D.#__________

# Tourists

SAFARI COMPANY NAME: ______________________________ Date __________

Address: ______________________________

NAME OF INTERVIEWEE: ______________________________

Address: ______________________________

**Characteristics**

1. What is your country of permanent residence? ____________
2. Age _____ 3. Gender: MALE FEMALE
4. Marital status: SINGLE MARRIED WIDOWED DIVORCED
5. Safari type: **Hunting** **Non-hunting**

______________________

**Guided** ______________________

**Non-guided** ______________________

6. How many days do (or did) you plan to spend on safari in Ngamiland and Chobe Districts? __________ DAYS
7. How many total days do (or did) you plan to spend in Botswana? __________ DAYS
8. How many other friends or relatives were traveling with you in your party? __________

**Income and Expenditures (in your currency)**

Currency:______________

9a. If you are part of a safari group, what was the total cost of the safari package? __________

9b. What percentage of the package was prepaid in your country of residence? _____ %

10. Did the safari costs include:

| | **yes** |
|---|---|
| airfare | _____ |
| food | _____ |
| lodging | _____ |
| license fees | _____ |
| other fees *(park permits, etc.)* | _____ |
| travel while in Botswana | _____ |
| weapons/ammunition | _____ |

11. Estimate your other costs (in your currency or pula) during your stay in Botswana: *(Do not include the safari costs)*

| | |
|---|---|
| - airfare | __________ |
| - food and beverages | __________ |
| - lodging | __________ |
| - transport while in Botswana | __________ |
| - guns, ammunition | __________ |
| - license fees | __________ |
| - other fees *(e.g., park permits)* | __________ |
| - taxidermy | __________ |
| - clothing | __________ |
| - camping equipment | __________ |
| - film, camera equipment | __________ |
| - other expenses | __________ |

12. What is your occupation?

- ____ professional *(doctor, dentist, teacher, etc.)*
- ____ executive, manager, public official
- ____ craftsperson *(carpenter, welder, repairperson)*
- ____ clerk, secretary, office worker, nurse
- ____ service *(policeman, fireman, cook)*
- ____ farmer, rancher
- ____ sales
- ____ laborer
- ____ truck/bus driver, other operative
- ____ housewife
- ____ armed forces
- ____ student
- ____ other *(explain)* ____________________

13. In general, what is your gross annual income before taxes? (estimate in your currency)

____________________

**Attitudes**

14. Why did you choose Botswana as your vacation destination?

- ___ good hunting
- ___ friends
- ___ other *(explain)* ____________________
- business
- ___ fewer tourists
- ___ no reason

15. Please list 3 things in order of importance that you liked most about your trip to Botswana:

____________________, ____________________, ____________________

16. Please list 3 things in order of importance that you disliked most about your trip to Botswana: _

____________________, ____________________, ____________________

17. Were you able to find the game or photography you were expecting here?

VERY DIFFICULT DIFFICULT OKAY EASY VERY EASY

18. Do you have any suggestions or comments on how wildlife tourism can be improved in Botswana?

19. Have you been in other African countries? YES NO If yes, how does Botswana compare to your other experiences?

20. Is this your first (second?) trip to Botswana? ____________________

21. Would you return to Botswana if you had the opportunity? YES NO Why?

22. How would you rate the accommodations in Botswana? (rate from 1-5 where 1=high, 5=low)

- ____ Airline access
- ____ Airline services
- ____ Customs and Immigration
- ____ Quality of local transportation
- ____ Ease of making travel arrangements
- ____ Quality of local services
- ____ Abundance of local services
- ____ Overall experience in Botswana

23. Additional comments:

## Additional Questions Suggested by the Hotel and Tourism Association of Botswana

24. Nationality:

25. Mode of travel to Botswana:
    - Major Airline (from where)
    - Private Charter
    - Other (vehicle)

26. Name and address of travel agent to whom you paid your package:

27. What type of accommodation did you use?
    - brick structure - reed hut - tent - hotel
    - other

28. Was the accommodation what you expected/preferred? Was the accommodation satisfactory or would you have liked other?

29. Did the increase in park fees affect your plans? Yes No
    If yes, in what ways?

30. Was motorboat/aircraft noise a problem for you? Yes No

31. Did you find the area you were in crowded? Yes No

32. What type of watercraft did you use?
    - motorboat - canoe - mokoro

33. Was motorboat traffic a problem for you? Yes No
    If yes, explain:

34. What areas did you visit and for how long?

    - Okavango/Moremi
    - Savuti/Linyanti
    - Chobe
    - Central Kalahari

I.D.#__________

# Safari Companies

COMPANY NAME: ______________________________ Date __________

Address: ______________________________

NAME AND POSITION OF INTERVIEWEE: ______________________________

Type of safari offered: _____ Hunting _____ Photo _____ Both

**Characteristics**

1. Where is this company's headquarters? ____________ (city) ____________ (country)

2. When was this company established? ____________

3. Is the company also located elsewhere in Africa? YES NO Where?____________

   Is the company also located elsewhere in the world? YES NO Where?____________

4. Where are your clientele from?

   ___%_______ (country), ___%_______ (country), ___%_______ (country), ___%_______ (country)

6a. How many clients have you served (or expect to serve) for the 1989 season? ____________

b. What percentage are hunters and non-hunters? ______% hunters ______% nonhunters

c. How many clients did you serve last year?______ d. Five years ago?______

**Employment**

5. Next, I need various information about the major types of employees you hire. Please tell me...

| Type | No. | % of Total Workers | Days Worked/ Year | Residence Ngamiland/ Chobe | Residence Other Botswana | Residence Non-residents | Annual Wages/ Worker Type |
|---|---|---|---|---|---|---|---|
| Prof. Hunters/Guides | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Safari Support *(e.g., skinners, trackers, cook)* | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Office Management | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Office Support | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Other | ____ | ____% | ____ | ____% | ____% | ____% | $____ |

6. In general, what percentage of this year's total employees worked for you last year? ______%

**Income and Expenditures (in pula) 1989 fiscal year**

7. What services does your company provide as part of a safari package?

| **Package:** ____________ | **Package:** ____________ | **Package:** ____________ |
|---|---|---|
| ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ |
| ____________ | ____________ | ____________ |
| **Fee:** | **Fee:** | **Fee:** |

8. What was the company's total annual gross income in Botswana before taxes last year? $________

9. Estimate the following annual expenses paid by this company for the 1989 fiscal year:
   - food and beverages ______ ______ % imported directly
   - vehicles (purchased/leased) ______ ______ % imported directly
   - vehicle repairs/maintenance ______ ______ % imported directly
   - vehicle fuel/oil ______ ______ % imported directly
   - labor ______
   - government fees/taxes paid ______
   - rent ______
   - utilities ______
   - other expenses
     ____________ ______ ______ % imported directly
     ____________ ______ ______ % imported directly

Attitudes

10. What changes are planned for your company in the next five years?

11. In your opinion by what percentage has wildlife tourism increased or decreased in Botswana in the last 5 years? ____% increased OR ____% decreased

12. Why was the company established in Botswana and particularly in northern Botswana?

13. Do you favor more or less development of the region for tourism? MORE LESS Why?

14. What do you feel are the major impediments to increased tourism in Botswana?
    ___ Transportation (local, international, air, land, connections)
    ___ Lodging facilities (quality of, number of, cost of)
    ___ Government bureaucracy: ________
    ___ Local expenses, costs
    ___ Image
    ___ Health concerns
    ___ There are none
    ___ Other *(explain)*________________
    Comments (most important impediment; improvements):

15. What are the major advantages of Botswana for wildlife-related tourism?
    ___ Wildlife (diversity, abundance, ease of finding)
    ___ Transportation (local, international, air, land, connections)
    ___ Facilities
    ___ Tourism policy
    ___ People
    ___ Parks and other protected areas
    ___ Other *(explain)* ________________
    Comments (most important advantage):

16. Have the increased park fees affected your business? Yes No

I.D.#__________



# Local Services Industry

COMPANY NAME: ______________________________ Date __________

Address: ______________________________

NAME AND POSITION OF INTERVIEWEE: ______________________________

Type of Service: ___ Lodging
___ Food and Beverage
___ Transport
___ Souvenir shop
___ Other *(explain)* ______________

**Characteristics**

1. Where is this company's headquarters? __________ *(city)* __________ *(country)*

2. When was this company established? __________

3. Is the company also located elsewhere in Africa? YES NO Where?__________
   Is the company also located elsewhere in the world? YES NO Where?__________

4. Where are your clientele from?

   ___%___ *(country)*, ___%___ *(country)*, ___%___ *(country)*, ___%___ *(country)*

**Employment**

5. Next, I need various information about the major types of employees you hire. Please tell me...

| Type | No. | % of Total Workers | Days Worked/ Year | Residence: Ngamiland/ Chobe | Residence: Other Botswana | Residence: Non-residents | Annual Wages/ Worker Type |
|---|---|---|---|---|---|---|---|
| Office Management | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Office Support | ____ | ____% | ____ | ____% | ____% | ____% | $____ |
| Other | ____ | ____% | ____ | ____% | ____% | ____% | $____ |

*(e.g., cooks, sales, drivers, maids)*

6. Estimate the following annual expenses paid by this company for the 1989 fiscal year:
   - food and beverages ______ ______ % imported directly
   - vehicles (purchased/leased) ______ ______ % imported directly
   - vehicle repairs/maintenance ______ ______ % imported directly
   - vehicle fuel/oil ______ ______ % imported directly
   - labor ______
   - government fees/taxes paid ______
   - goods for resale ______
   - rent ______
   - utilities ______
   - other expenses

     ______________ ______ ______ % imported directly

     ______________ ______ ______ % imported directly

     ______________ ______ ______ % imported directly

7. What was the company's total annual gross income in Botswana before taxes last year? $__________
8. What is your company's current capital investment in Botswana with respect to tourism?
   P_____________ Capital
   P_____________ Inventory

Attitudes:

9. In your opinion by what percentage has wildlife tourism increased or decreased in Botswana in the last 5 years? _____% increased OR _____% decreased

10. Do you favor more or less development of the region for tourism? MORE LESS Why?

11. What do you feel are the major impediments to increased tourism in Botswana? (explain)
    ___ Transportation (local, international, air, land, connections)
    ___ Lodging facilities (quality of, number of, cost of)
    ___ Government bureaucracy: ___________
    ___ Local expenses, costs
    ___ Image
    ___ Health concerns
    ___ There are none
    ___ Other *(explain)*________________________________________
    **Comments (most important impediment; improvements):**

12. What are the major advantages of Botswana for wildlife-related tourism?
    ___ Wildlife (diversity, abundance, ease of finding)
    ___ Transportation (local, international, air, land, connections)
    ___ Facilities
    ___ Tourism policy
    ___ People
    ___ Parks and other protected areas
    ___ Other *(explain)* ________________________________________
    **Comments (most important advantage):**

**(Hotel and Lodging only)**

13. What is the capacity (bedspace) of this hotel/lodge? __________
14. What percent of the year is the hotel/lodge at full capacity?_________ percent of the year
15. What is your average occupancy? _________ /___________

16. Have the increased park fees affected your business? Yes No

# APPENDIX B

Exchange Rates used when Converting Tourists Expenditures into United States Dollars

Exchange Rates used when Converting Tourists
Expenditures into United States Dollars

| Country | Currency | Exchange Rate to U.S. Dollar |
|---|---|---|
| Austria | Schilling | 11.92 |
| Botswana | Pula | 1.89 |
| Canada | Dollar | 1.16 |
| Denmark | Kroner | 6.47 |
| Great Britain | Pound | 1.64 |
| France | Franc | 5.69 |
| W. Germany | Mark | 1.69 |
| Italy | Lira | 1246.85 |
| Japan | Yen | 157.20 |
| Kenya | Schilling | 21.90 |
| Luxembourg | Franc | 35.08 |
| Netherlands | Gilder | 1.90 |
| Republic of S. Africa | Rand | 2.65 |
| Sweden | Kroner | 6.13 |
| Switzerland | Franc | 1.49 |
| Zimbabwe | Dollar | 2.41 |

The rates above compiled by the Bank of America, give the rates of exchange for the United States dollar against the various currencies as of 12 April 1990. All rates are expressed in foreign currency units per one U.S. dollar.

# APPENDIX C

Department of Wildlife and National Parks of Botswana
Old and New Park Fee Schedules

Source: Botswana Government Gazette
April 1988, and December 1988

Park Fees before July 1, 1989



*Statutory Instrument 40 of 1988*

FAUNA CONSERVATION ACT
(Cap. 38:01)

**FAUNA CONSERVATION (AMENDMENT OF FIFTH SCHEDULE) ORDER, 1988**
(Published on 8th April, 1988)

ARRANGEMENT OF PARAGRAPHS

PARAGRAPH
1. Citation
2. Amendment of Fifth Schedule to Cap. 38:01
SCHEDULE

IN EXERCISE of the powers conferred on the Minister of Commerce and Industry by section 27 of the Fauna Conservation Act, the following Order is hereby made--

1. This Order may be cited as the Fauna Conservation (Amendment of Fifth Schedule) Order, 1988.

2. The Fifth Schedule to the Fauna Conservation Act is hereby amended by substituting for that Schedule the following new Schedule.

*Amendment of Fifth Schedule to Cap. 38:01*

"FIFTH SCHEDULE

| *Bird Hunting Licence* | Fee (Pula) | Period |
|---|---|---|
| Citizen | 2,00 | 12 months |
| Resident | 20,00 | 12 months |
| Non Resident | 40,00 | 1 week |
| Non Resident | 80,00 | 1 month |
| Non Resident | 200,00 | 3 months |
| *Professional Guide's Licence* | | |
| Citizen | 50,00 | |
| Resident | 300,00 | |
| Non Resident | 500,00 | |
| *Professional Hunters Licence* | | |
| Citizen | 100,00 | |
| Resident | 400,00 | |
| Non Resident | 750,00 | |
| Trophy Dealer's Licence | 50,00" | |

MADE this 28th day of March, 1988

M.P.K. NWAKO,
*Minister of Commerce and Industry.*

*L2/7/88/10 II*

Park Fees After July 1, 1989

## SCHEDULE

(regs. 4(2), 5(3), 6(6), 7(2), 8(1))

## FEES

1. *Fees payable on entry:*

(i) Privately organized tours —

| | *Citizen* | *Resident* | *Non Resident* |
|---|---|---|---|
| | P | P | P |
| (*a*) Persons of 16 years of age or over | 2,00 per day | 10,00 per day | 50,00 per day |
| (*b*) Children between the ages of 8 and 15 inclusive | 1,00 per day | 5,00 per day | 25,00 per day |
| (*c*) Children of 7 years and below | Free | Free | Free |

(ii) Tours through Botswana registered, based and licensed tour operators and established lodges and hotels —

| | | | |
|---|---|---|---|
| (*a*) Persons of 16 years of age or over | 2,00 per day | 10,00 per day | 30,00 per day |
| (*b*) Children between the ages of 8 and 15 years inclusive | 1,00 per day | 2,00 per day | 5,00 per day |
| (*c*) Children of 7 years and below | Free | Free | Free |

2. *Camping Fees:*

(i) Privately organized tours —

| | | | |
|---|---|---|---|
| (*a*) Persons of 16 years of age or over | 5,00 per night | 10,00 per night | 20,00 per night |
| (*b*) Children between the ages of 8 and 15 years inclusive | 1,00 per night | 2,00 per night | 10,00 per night |
| (*c*) Children of 7 years and below | Free | Free | Free |
| (ii) Tours through Botswana registered, based and licensed tour operators, and established lodges and hotels — | | | |
| (*a*) Persons of 16 years of age or over | 1,00 per night | 5,00 per night | 10,00 per night |
| (*b*) Children between the ages of 8 and 15 years inclusive | 50t per night | 2,00 per night | 5,00 per night |
| (*c*) Children of 7 years and below | Free | Free | Free |
| 3. *Fishing Permit* | 1,00 per day | 5,00 per day | 10.00 per day |

4. *Vehicle Entrance Fee:*

| | |
|---|---|
| (*a*) Botswana registered | 2,00 per day |
| (*b*) Foreign registered | 10,00 per day |
| (*c*) Vehicle entrance fee paid by an operator based in Game Reserve | P500 per annum in respect of that Game Reserve only. |
| (*d*) Excess vehicle weight fee for every 450 kg or part thereof in excess of 3,500 kg unladen weight | P250 per day |

5. *Boat entrance fee:*

| | |
|---|---|
| (*a*) All boats other than canoes or dugouts | 5,00 per day |

| | |
|---|---|
| (*b*) All boats, other than canoes or dugouts, used by an operator based in a Game Reserve | P150,00 per annum in respect of that Game Reserve only |
| (*c*) Canoes or dugouts | Free |

6. *Aircraft Entrance fee:*

Locally registered P2,00 per day
Foreign registered P10,00 per day

MADE this 14th day of December, 1988.

M.P.K. NWAKO,
*Minister of Commerce and Industry.*

*L2/7/88/9 II*

# APPENDIX D

## Park Permit Data

## Park Permit Data

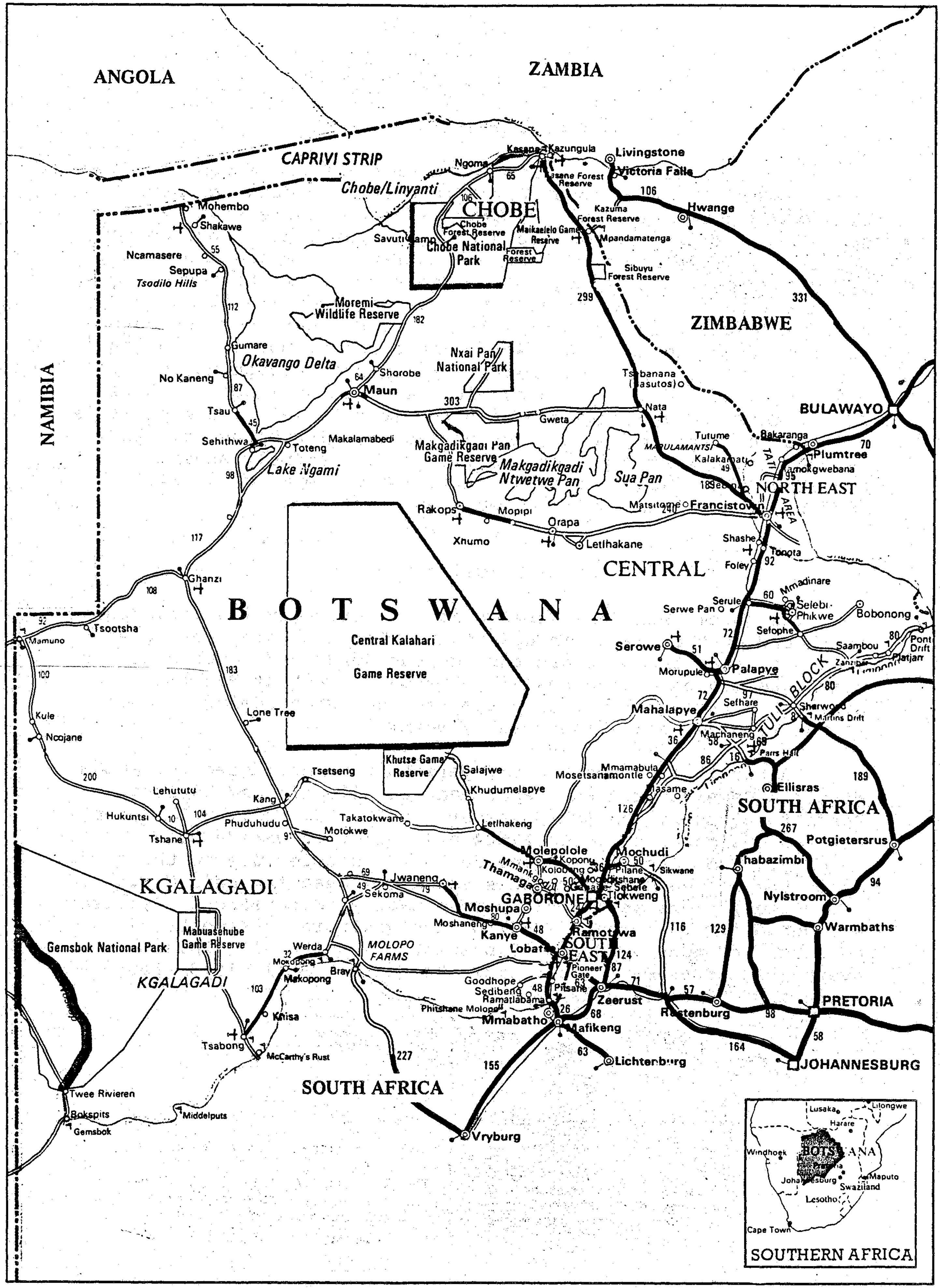
Three of the parks (Nxai Pan National Park, Moremi Wildlife Reserve, and Chobe National Park) in northern Botswana (Map 1) have gates that are manned by DWNP personnel where visitor numbers are recorded. Visitors to these parks are required to purchase an entrance permit at the entrance gate and are also asked to sign the Gate Log book. These parks are believed to be the areas that the majority of visitors go when traveling to a national park or reserve (Hill 1988). Gate Entry Permits were obtained from the DWNP for two of these parks, Moremi Wildlife Reserve and Chobe National Park, for January through November, 1989 and analyzed (Nxai Pan permits were not available). Hill (1988) analyzed and compared gate receipts for all three parks as well as the Gate Log books, to compare any discrepancies. Hill reported that Nxai Pan entry permits were extremely sketchy, therefore when data from 1989 permits were compared to Hill's 1987 data, Nxai Pan estimates were not included.

### Moremi Wildlife Reserve

The Moremi Wildlife Reserve is approximately 110 Kilometers north and east of Maun, in Ngamiland. The two main areas where visitors enter the park are through the North and South gates which are manned continuously by the Department of Wildlife and National Parks. All visitors are recorded when coming in and out of the Reserve, and possess entry permits.

In total, 1,559 park entry permits were collected for Moremi Wildlife Reserve from the Department of Wildlife and National Parks for January through November, 1989. In total, 7,134 people entered the park, of which 2,624 of those were with a safari company. From January to June 30, 3,202 people entered the park. After the increase in park fees on July 1 (see Appendix C for fee schedules), there were 3,932 people that entered Moremi. Citizens accounted for 10 percent (734) of the visitors, residents 17 percent, and non-residents 72 percent of the total. These averages differ very little from the figures Hill (1988) found averaging 1985-1988 data.

Map 1


ANGOLA
ZAMBIA
CAPRIVI STRIP
Chobe/Linyanti
CHOBE
Chobe National Park
Livingstone
Victoria Falls
Hwange
ZIMBABWE
NAMIBIA
Moremi Wildlife Reserve
Okavango Delta
Nxai Pan National Park
Maun
Lake Ngami
Makgadikgadi Pan Game Reserve
Makgadikgadi Ntwetwe Pan
Sua Pan
BULAWAYO
Plumtree
NORTH EAST
Francistown
CENTRAL
B O T S W A N A
Central Kalahari Game Reserve
Ghanzi
Serowe
Palapye
Mahalapye
TULI BLOCK
Selebi-Phikwe
Khutse Game Reserve
Ellisras
SOUTH AFRICA
Potgietersrus
KGALAGADI
Gemsbok National Park
Mabuasehube Game Reserve
Molepolole
Mochudi
GABORONE
Jwaneng
Moshupa
Kanye
Lobatse
SOUTH EAST
Thabazimbi
Nylstroom
Warmbaths
PRETORIA
Zeerust
Rustenburg
Mmabatho
Mafikeng
Lichtenburg
JOHANNESBURG
MOLOPO FARMS
Tsabong
Twee Rivieren
Vryburg
SOUTH AFRICA
SOUTHERN AFRICA

| | Moremi | Chobe |
|---|---|---|
| Citizen | | |
| Hill 1987 | 7% | 8% |
| Borge 1989 | 10% | 9% |
| Resident | | |
| Hill 1987 | 18% | 24% |
| Borge 1989 | 17% | 21% |
| Non-resident | | |
| Hill 1987 | 75% | 68% |
| Borge 1989 | 72 % | 69% |

Revenue generated from entry permits, camping fees, fishing permits, and vehicle fees, totalled P345,975 for January through November. Camping fees accounted for 19 percent (P67,041) of this with a total of 2,144 paid for camping nights. Camping fees for safari companies accounted for P31,403, and total fees for safari companies was P218,661.

Chobe National Park

Chobe National Park is situated in the northeast corner of Botswana and is a much larger area than Moremi. Visitors enter the park at Ngoma bridge, Kasane, or Mbabe gates, fees are collected at Mbabe and Kasane.

In total, 3,219 entry permits were collected and analyzed for Chobe National Park, for 1989. A total number of 16,024 people of which 6,735 were with a Botswana registered safari company were recorded entering the park. Before July 1, 10,110 people entered Chobe, and after July, 5,917 people came to the park. Citizens accounted for 9 percent of the total, 21 percent were residents, and 69 percent of the visitors were non-residents.

Total revenue generated from camping fees, entry fees, fishing permits, and vehicle permits, was P372,802, of which P210,724 was paid by safari companies. Camping fees accounted for P49,465 of the total, and safari company camping fees were 40 percent of all overnight fees.

Totals for Moremi and Chobe

The total number of people entering the two parks for 1989 was 23,178. Of those, 9,359 (40 percent) were with a safari company, and the rest (13,819) are assumed to be independent travelers. Citizens were the least represented group with only 9 percent of the total; residents accounted for 20 percent, and non-residents 70 percent.

The government of Botswana collected P718,777 in both parks for the 11 months of available data. On average, 60 percent (P429,834) of the revenue collected was paid in by safari companies, of which P51,232 (7 percent) was only for camping fees. All members of HATAB who were mobile safari operators (1989), summed the total park fees that they paid to the Government from July 1, 1989 through November 15, 1989 equalling P614,000 (M. Mothoagae, 1990). The difference between park permit data for all safari companies (mobiles safari operators + permanent camps) (P429,834) from DWNP, and only mobile safari operators (P614,000) was quite large. This adds to the suspicion that the park permits data cannot be taken as a solely reliable source, but as an underestimate of what really exists (see Limitations).

The parks permit data collected in 1990 was only available for January through November, 1989. The data was compared to Hill's data for January to November 1987 (Appendix Table D1).

The data seems to be similar; Hill obtained more permits (6,364 permits), possibly because there were actually more permits, and thus more people, or the permits collected for 1989 (4,778 permits) were deficient, and the limitations evident. It is assumed in this report for comparison purposes, that the information collected from the DWNP (for January through November, 1989) were complete.

APPENDIX TABLE D1. 1989 PERMIT DATA COMPARED WITH ALLEN HILL'S DATA JANUARY THROUGH NOVEMBER 1987

| | Moremi W.R. | Chobe N.P. | Total |
|---|---|---|---|
| # Permits (1989) | 1,559 | 3,219 | 4,778 |
| 1987 A. Hill | 1,967 | 4,397 | 6,364 |
| People | 7,134 | 16,024 | 23,158 |
| 1987 A. Hill | 9,158 | 20,814 | 29,972 |
| # Vehicles | 1,684 | 3,257 | 4,941 |
| Days | 4,145 | 7,319 | 11,464 |
| Nights | 2,144 | 2,444 | 4,588 |
| Camping fees | 67,041 | 49,495 | P116,536 |
| Citizen | 734 | 1,381 | 2,115 |
| 1987 A. Hill | 533 | 2,164 | 2,697 |
| Resident | 1,210 | 3,445 | 4,655 |
| 1987 A. Hill | 1,343 | 4,147 | 5,490 |
| Non-resident | 5,154 | 11,064 | 16,218 |
| 1987 A. Hill | 7,282 | 14,504 | 21,786 |
| Total Pula | P345,975 | P372,802 | P718,777 |
| 1987 A. Hill | P100,683 | P166,174 | P266,857 |
| Safari Companies (only) Data 1989 | | | |
| People | 2,624 | 6,735 | 9,359 |
| Camping fees | P31,403 | P19,829 | P51,232 |
| Total Pula | P218,661 | P210,724 | P429,384 |
| Total Pula reported by HATAB mobile companies (not including companies other than mobiles) | | | P614,000 |

Data that were not comparable with Hill's data were the following categories: number of vehicles, total days, total nights, and camping fees. The ratio of citizen/resident/non-resident populations who visited both parks was similar in 1989 as was in 1987. One main conclusion that was evident was that in total there were 6,814 less people in the two parks in 1989; however, there was an increase of P451,920 generated for the DWNP. This increase in income generated resulted from the park fee increase. The Government's intention of reducing total numbers (high cost/low volume) seems to have been successful, at least from July - November. This year (1990) would be a good indicator of how the fee schedule might affect total numbers with respect to revenue generated in park fees.

# APPENDIX E

## Major Issues Proposed in the Botswana Tourism Policy Draft Paper of 1989

Source: Draft Tourism Policy Paper produced for purposes of consultation by the Ministry of Commerce and Industry, Gaborone, 1989

# Major Issues Proposed in the Botswana Tourism Policy Draft Paper of 1989

1. The main objective of this tourism policy is to obtain from the tourism resources of the country, on a sustainable basis, the greatest possible net social and economic benefits for Botswana.

   Among the subordinate objectives, two stand out:

   1) to shift the mix of tourists away from those who are casual campers towards those who occupy permanent accommodation; and

   2) to increase substantially the financial returns from tourism to the people of Botswana.

2. Under the provisions of a new Tourist Industry Licensing Act, to be administered by a new Department of Tourism within the Ministry of Commerce and Industry and a Tourism Licensing Board associated with the Ministry, a system of licensing and regulation will be introduced for hotels, motels, lodges, permanent camps, safari operators and travel agents. All of these entities, except the last two, will also be covered by a system of grading.

3. Concessions on State or tribal lands leased to qualified operators will be governed by certain basic terms and conditions.

   Lessees will be selected in accordance with a new process containing a number of elements.

4. To increase the public benefits received from Botswana's tourism resources, a number of changes affecting taxation of the tourism industry will be made.

5. Admission and campsite fees for non-citizens using the National Parks and Reserves have recently been increased. They will be increased again, if necessary, in order to avoid over-crowding.

6. Under the terms of their licenses, tourism operators will be expected to pursue a number of objectives, one of which will require them to provide Botswana with genuine opportunities for investment and employment. Among other things, the government will encourage joint venture arrangements that will provide citizens with means of increasing their participation in the industry.

7. Within the Ministry of Commerce and Industry, or in close association with it, a number of institutions will be substantially involved in implementation of the new policy on tourism. These include: The Department of Wildlife and National Parks, a new Department of tourism (upgraded from the Tourism Unit), a new Tourism Licensing Board, and a new National Advisory council on Tourism.